



# Investor Presentation Released July 2024

Fact Book Based on FY 2023

Ticker: CON  
ADR-Ticker: CTTAY  
<http://www.continental-ir.com>

# Agenda

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1	Continental Group	3
2	Automotive Group Sector	16
3	Tires Group Sector	52
4	ContiTech Group Sector	67
5	Corporate Governance	89
6	Sustainability	95
7	Financials	106
8	Back-up	119

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# Agenda

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# Continental Group

## Leading the Way for Your Mobility



Leading technology provider and systems integrator of choice for the **software-defined** vehicle



Material expertise for **industry solutions**



Industry-benchmark in **tires**



**~200,000** talented and dedicated employees

# Continental – Who We Are



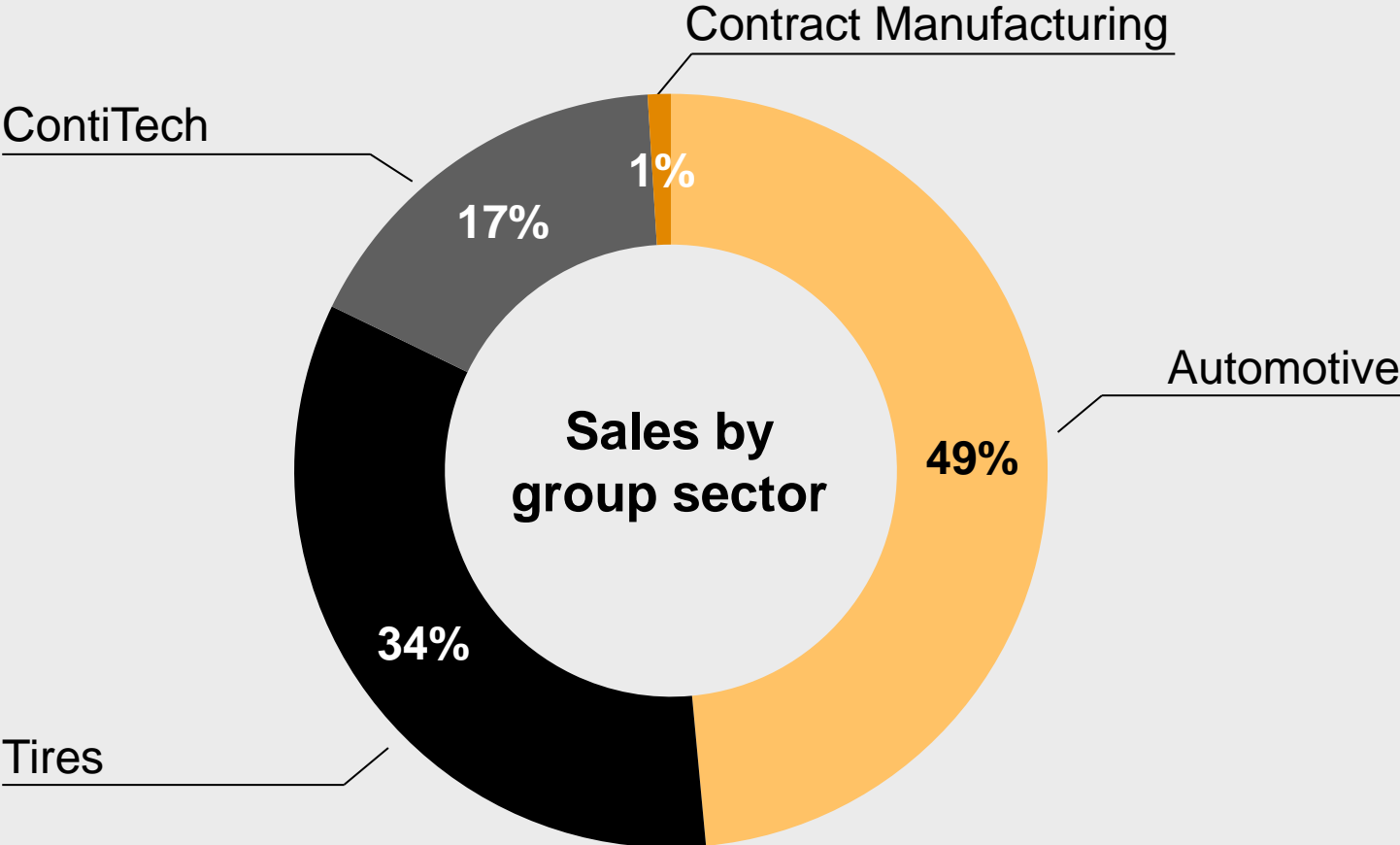
€ **41.4** billion sales



~**200,000** employees



**505** locations in **56** countries and markets



As at: December 31, 2023.

# Continental – Who We Are

## Our Structure

### Group



#### Group Sector

#### Automotive



#### Tires



#### ContiTech



#### Business Area

- › Safety and Motion
- › Autonomous Mobility
- › User Experience
- › Architecture and Networking
- › Software and Central Technologies

- › Original Equipment
- › Replacement APAC
- › Replacement EMEA
- › Replacement the Americas
- › Specialty Tires

- › Industrial Solutions AMERICAS
- › Industrial Solutions APAC
- › Industrial Solutions EMEA
- › Original Equipment Solutions
- › Surface Solutions

# Continental on the Move



**2010–2018**

## **Era of Success**

Value accretive  
outperformance



**2018–2020**

## **Era of Decline**

Deterioration of  
profitability



**2020–2023**

## **Era of Recalibration**

Stabilization and  
laying foundation



**2024+**

## **Era of Execution**

Excelling out of  
transformation

# 2024+ Era of Execution

## Our Strategic Mission



**We are the mobility and material technology group  
for safe, smart and sustainable solutions.**



# 2024+ Era of Execution

## Our Approach & Commitment

The triple play for future value



### ① SHORT-TERM PERFORMANCE

Improve efficiency  
**Consistent delivery**

### ② MID-TERM STRATEGY

Execute portfolio strategy  
**Stepwise target achievement**

### ③ LONG-TERM VISION

Create value for a better tomorrow  
**Our technologies. Your solutions. Powered by the passion of our people.**

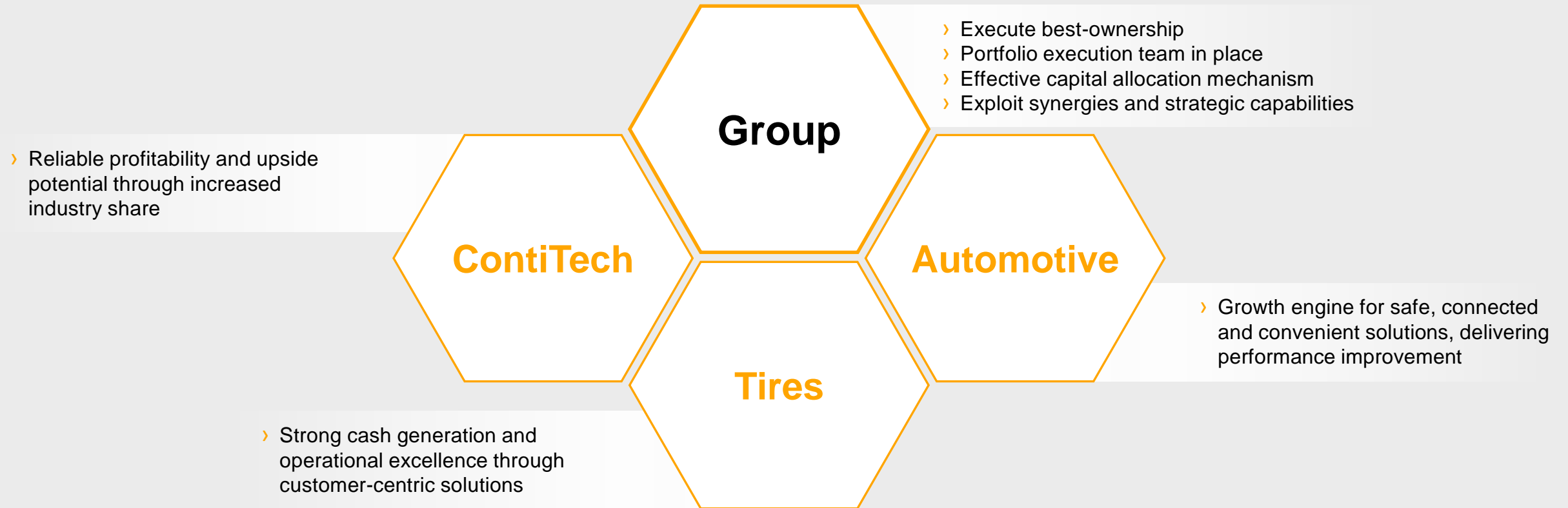
#### Management focus

- › Clear targets
- › Accountability
- › Execution
- › Prioritize
- › Industrial logic
- › Clear decisions
- › Technology
- › Transformational change
- › Invest in employees

**How will we achieve this?**  
**With our decisive and performance-driven team.**

# 2024+ Era of Execution

## Our Joint Contributions



**Independent when necessary – united where purposeful**

# 2024+ Era of Execution

## Automotive

- › Growth engine for safe, connected and convenient solutions
- › Upside via focus and performance

- › **LEAD** In all product groups in **value creation** and **technological excellence**
- › **FOCUS** Strict **portfolio** management along value-accretive principles
- › **PERFORM** Rigorous execution of **cost reduction programs**  
Top in operational and commercial excellence
- › Conduct continuous **portfolio reviews**
  - › **User Experience business area** carve-out and preparation of strategic options
  - › **Other businesses** of combined annual sales of ~€1.4 bn under review
  - › Streamlining business by dissolution of former **Smart Mobility business area**



# 2024+ Era of Execution

## Tires

- › Strong cash generation
- › Operational excellence through customer-centric solutions

- › **Strong resilience** across business cycles
- › **Best-in-class value creation** and **cash generation** based on our **CORE** of
  - › **operational excellence**
  - › **technology**
  - › **brand power**
- › Realizing **OPPORTUNITIES** by tapping into **profit pools** and gaining traction: such as EVs, UHP, sustainability (**RESPONSIBILITY**) and APAC/AM regions
- › Clear differentiation through **customer centricity** is key to continued outperformance



# 2024+ Era of Execution

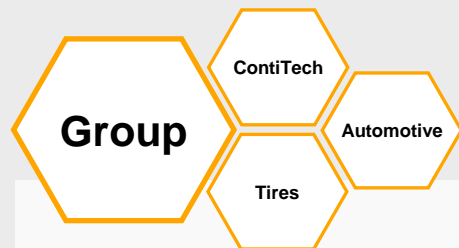


## ContiTech

- › Reliable profitability and upside potential through increased industry share
- › Focus on margin-accretive industry business

- › **ENSURE SUCCESS** by focusing strong margin-accretive **INDUSTRY BUSINESS**
  - › Legal and physical **independence of OE Solutions business area**
  - › **Rightsizing** while improving performance of **AUTOMOTIVE BUSINESS**
  - › Increase **industry share to ~80%**
- › Convert strong **industry OE position** into profitable replacement business
- › Leverage unmatched portfolio and **material leadership to outperform**

# Group Financial Outlook



**Sales**



**Adj.  
EBIT<sup>1</sup>  
margin**

	2023	Short-term	Mid-term
<b>Group</b>	<b>€41.4 bn</b>	<b>~€44–48 bn</b>	<b>~€51–56 bn</b>
Automotive	€20.3 bn	~€22–24 bn	~€26–29 bn
Tires	€14.0 bn	~€15–16 bn	~€17–18 bn
ContiTech	€6.8 bn	~€7–8 bn	~€8–9 bn
<b>Group</b>	<b>6.1%</b>	<b>&gt;8%</b>	<b>~8–11%</b>
Automotive	1.9%	>6%	~6–8%
Tires	13.5%	>13%	~13–16%
ContiTech	6.7%	>9%	~9–11%

<sup>1</sup> Before amortization of intangibles from PPA, changes in the scope of consolidation (only 2023) and special effects. Considering current portfolio.

# Executive Board



**Nikolai Setzer**  
Chairperson of the Executive Board

Group Communications and Public Affairs, Group Strategy, Group Purchasing, Contract Manufacturing, Market China, Group Information Technology

First appointed: August 2009  
Appointed until: March 2029



**Olaf Schick**  
Chief Financial Officer

Group Finance and Controlling, Group Compliance, Group Internal Audit, Group Law and Intellectual Property, Group Quality, technical Compliance, CBS and Environment, Group Risks and Controls

First appointed: May 2023  
Appointed until: April 2026



**Dr. Ariane Reinhart**  
Chief Human Relations & Sustainability Officer

Group Human Relations, Group Sustainability, Director of Labor Relations,

First appointed: October 2014  
Appointed until: September 2025



**Christian Kötz**  
Group Sector Tires

Group Sector Tires

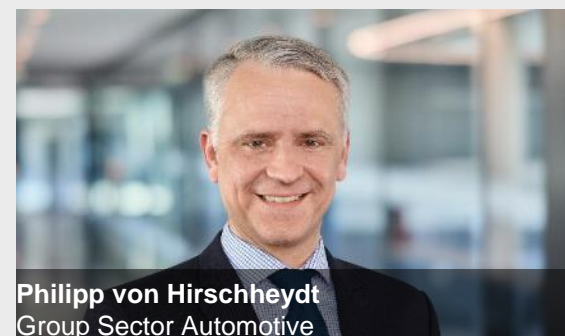
First appointed: March 2019  
Appointed until: April 2027



**Philip Nelles**  
Group Sector ContiTech

Group Sector ContiTech

First appointed: June 2021  
Appointed until: May 2029



**Philipp von Hirschheydt**  
Group Sector Automotive

Group Sector Automotive

First appointed: May 2023  
Appointed until: April 2026

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# Automotive at a Glance



€ **20.3** billion  
in **sales**



Adj. EBIT<sup>1</sup> margin  
**1.9%**



**Global footprint**  
56 plants in  
21 countries  
82 R&D locations  
in 18 countries



~**102,500**  
employees



Product clusters  
**>50**

**Creating value while driving the future of mobility**

Data shown as at December 31, 2023. <sup>1</sup> Before amortization of intangibles from PPA, changes in the scope of consolidation, and special effects.

# The Software-defined Vehicle

## Our Definition

**In a software-defined vehicle (SDV), functions are enabled by software.**

Decoupling software from hardware enables swift and continuous development and implementation of new functions and software updates throughout the vehicle's lifetime.

**The automobile, which until a few years ago was a self-contained system, has become part of a much more complex software-centric ecosystem – the IoT<sup>1</sup>.**

This results in new requirements regarding – products, collaboration, development, system integration and ecosystem (monetization).

**Focus pivoting to the growing importance of software and the complete system.**

**While hardware solutions evolves to meet the future needs of the vehicle.**

<sup>1</sup>IoT: Internet of things

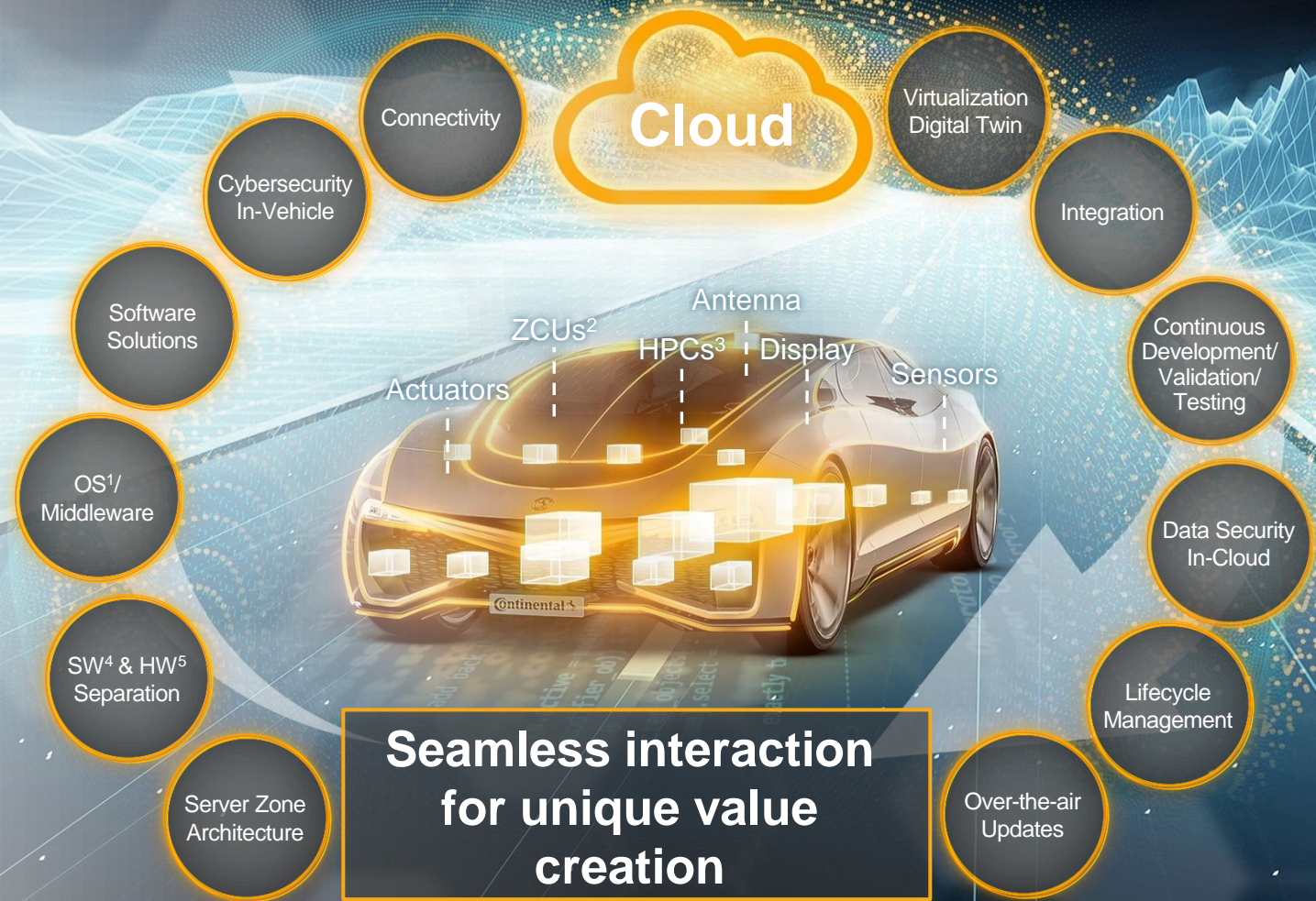
# Road to Cloud Ecosystem

Enable. Develop. Integrate.

**We deliver value through:**  
The broadest system understanding across the ecosystem - from road to cloud

**We connect the dots with:**

- › Hardware enablers
- › Software enablers
- › Software solutions
- › System integration



<sup>1</sup> OS: Operating System <sup>2</sup> ZCU: Zone Control Unit <sup>3</sup> HPC: High-Performance Computer <sup>4</sup> SW: Software <sup>5</sup> HW: Hardware

# Our Industry Changing Technology Requirements



- › Evolving system architectures
- › Consolidating multiple functions
- › Specialized and high computing power

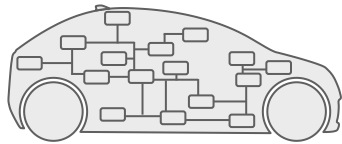
- › Cloud services
- › Functions on demand
- › Speed: “code to road” in 1 day

- › Evolving technology stacks
- › Evolving value chain
- › Increased complexity

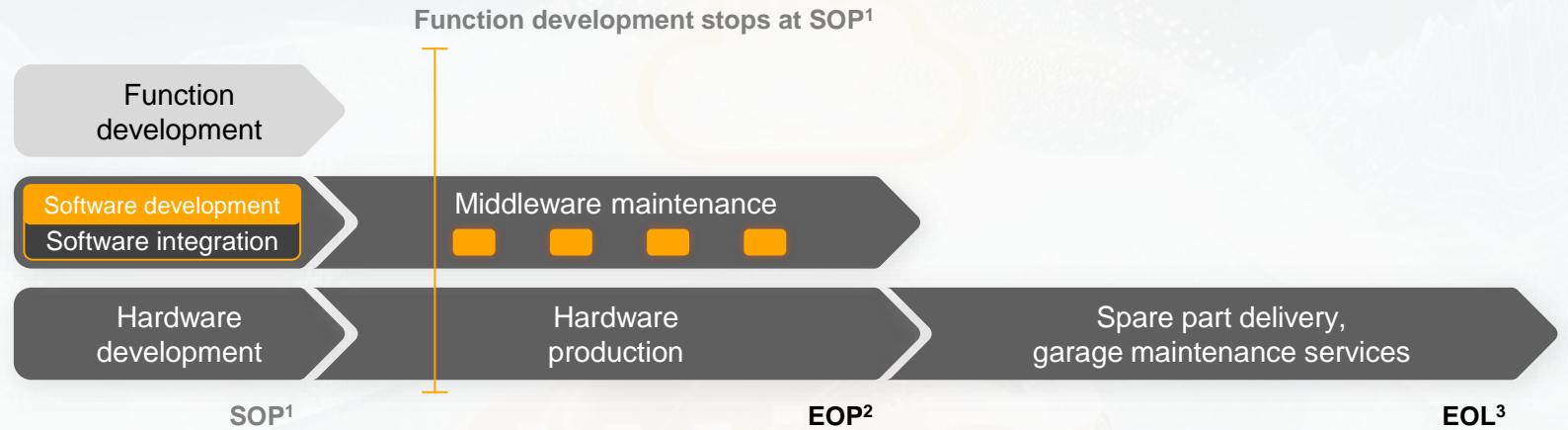
<sup>1</sup> CSP: Cloud service provider <sup>2</sup> OEM: Original Equipment Manufacturer

# Our Industry New Value Streams Emerge

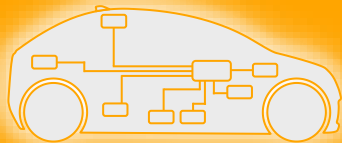
Hardware and function coupling – software combined with hardware



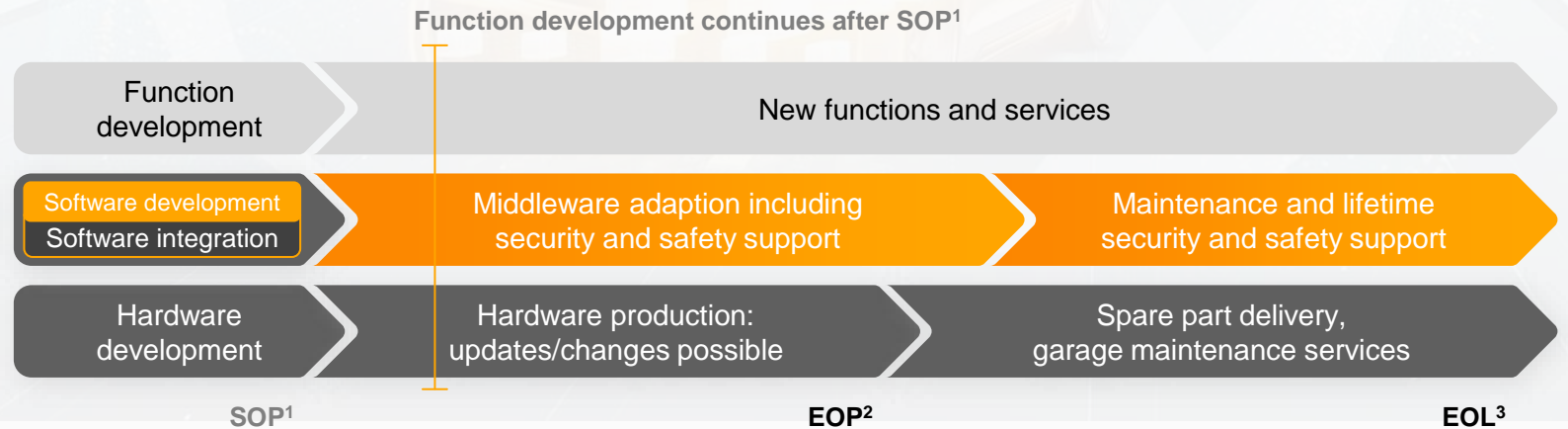
TRADITIONAL CAR



Hardware and software decoupling – software updates and maintenance across lifecycle



SDV



<sup>1</sup> SOP: Start of production <sup>2</sup> EOP: End of production <sup>3</sup> EOL: End of life

# Our Answer Delivering Value for the Software-defined Vehicle

## Continental Automotive – Lead. Focus. Perform.



### Safety and Motion (SAM)



- › Motion system expertise from braking to full vehicle motion
- › Passive and active safety



### Autonomous Mobility (AM)



- › Scalable systems
- › Innovative business models



### User Experience (UX)



- › Ultra-wide
- › Personalized
- › Fully integrated



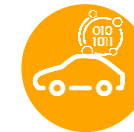
### Architecture and Networking (AN)



- › Full stack frameworks
- › Backbone of the vehicle functions



### Software and Central Technologies (SCT)



- › SW, HW and systems
- › Innovation
- › Sustainability
- › R&D<sup>1</sup> Excellence

**We make mobility safe, exciting & autonomous**

<sup>1</sup> R&D: Research and Development



# A Leading Systems Supplier

World-class  
portfolio

High-tech and  
high-quality  
electronic  
hardware

+

Substantial  
software  
expertise paired  
with  
partnerships

=

Leading  
automotive  
systems  
supplier

**Focused execution required to ensure  
future commercial success**



# LEAD In Our Focus Areas – or Exit

## Main sales drivers



### Safe

~4%

Market CAGR<sup>1</sup> 2023–2028e

### SAM

~100 bps

OUTPERFORMANCE

- › Wheel brake
- › EBS<sup>2</sup> and one box
- › Sensor systems
- › Airbag systems



### Exciting

~16%

Market CAGR<sup>1</sup> 2023–2028e

AN ~300 bps  
OUTPERFORMANCE

UX ~400 bps  
OUTPERFORMANCE

SCT ~1,000 bps  
OUTPERFORMANCE

- › Display solutions
- › Digital cluster
- › Access systems
- › Instrument cluster



### Autonomous

~12%

Market CAGR<sup>1</sup> 2023–2028e

### AM

~1,000 bps

OUTPERFORMANCE

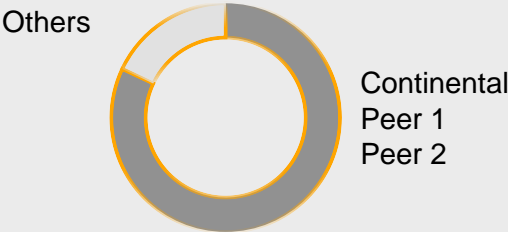
- › Radar
- › Smart camera
- › Satellite camera
- › AD<sup>3</sup>/ADAS<sup>4</sup> ECU<sup>5</sup>

<sup>1</sup> CAGR: Compound annual growth rate. Outperformance: Sales growth compared to PC&LT production, average from 2023–2028e. <sup>2</sup> EBS: Electronic Brake System <sup>3</sup> AD: Autonomous Drive  
<sup>4</sup> ADAS: Advanced Driver-assistance System <sup>5</sup> ECU: Electronic Control Unit

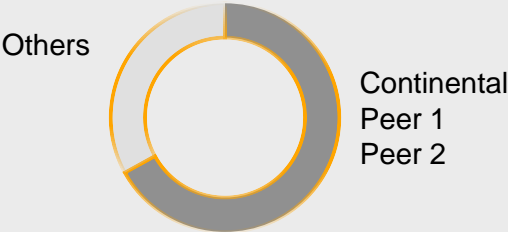
# LEAD One of the Largest Suppliers

Example areas – around 50% of Automotive sales

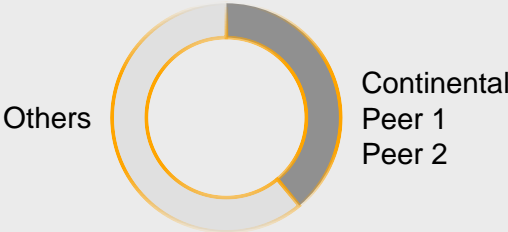
Electronic Brake System



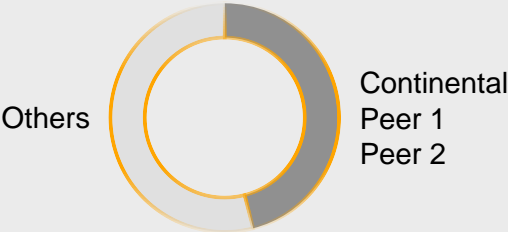
Radar



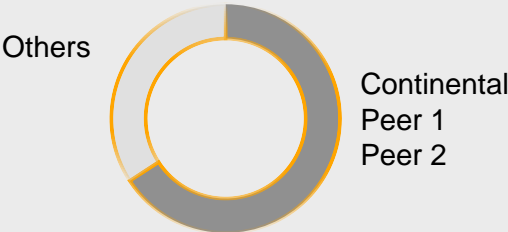
Display Solutions



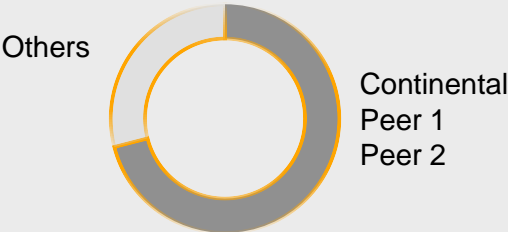
Wheel Brake



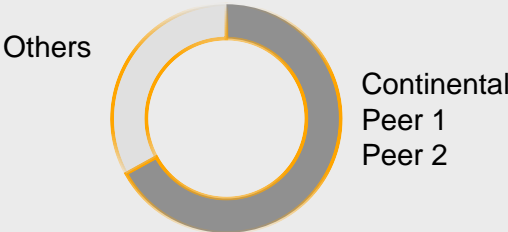
Airbag Systems



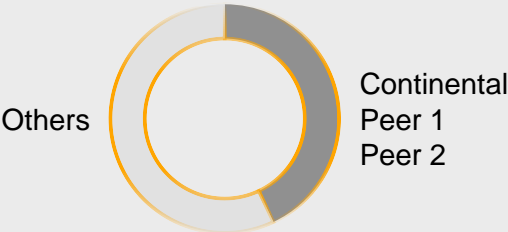
Access Systems



Digital Cluster



Sensor Systems



■ Market share of top 3 suppliers    □ Market share of other suppliers

# LEAD Mastering all Fields: System Integrator of Choice

## Our foundation

High-quality hardware paired with software experience

## Our technology

Purpose-built artificial intelligence SoCs<sup>1</sup> from our strategic partner



## We are THE system integrator

- › **We combine software capabilities and automotive competence**  
Multiple party software integration ensuring automotive requirements and automation: Continental Cooperation Portal (CCP)
- › **We master data**  
Large data processing, artificial intelligence, machine to machine communication
- › **We manage the entire tech stack**  
From SoCs, hardware, middleware and functions to cloud services
- › **We manage complexity**  
In-house expertise in cross-domain and autonomous driving high-performance computers



## Our offering

**Realizing autonomous driving systems at scale, together with our strategic partner**



<sup>1</sup> SoC: System on chip

# LEAD Combining Hardware and Software

## Selected examples

### Today: Outstanding technology platform

- › Electronic brake system
- › One box

SAM

- › Gateways
- › Body controller

AN

- › Radar, camera, lidar
- › Ultrasonic sensors

AM

### Step 1: Enhanced products – Higher content per vehicle

- › Future brake system 2 / 3
- › Wheel hub drive with integrated brake

- › Zone controller
- › Smart access systems
- › Cross domain HPC

- › Full sensor suite
- › Aurora partnership
- › Autonomous driving HPC

### Step 2: Addition of features – New sources of revenue

- › Park brake redundancy included
- › Automated driving SAE<sup>1</sup> level ≥3 enabler

- › Digital key management
- › Interior intrusion / presence detection

- › Automatic parking
- › Transparent vehicle/trailer
- › Cruising companion

<sup>1</sup> SAE: Society of Engineers



# FOCUS

# FOCUS Active Portfolio Management

## Decision criteria

- › Value creation
- › System expertise
- › Technology focus
- › Growth potential

## Execution plan

Review of entire portfolio

Improve, sell or close

~25% of total business  
will change

# FOCUS Streamlining the Business

## Today's structure

- Autonomous Mobility
- Safety and Motion
- Architecture & Networking
- Software & Central Technologies

- User Experience
- Smart Mobility<sup>1</sup>

~€1.4 bn sales to improve, sell or close

~€3.5 bn sales: carve-out initiated

Dissolution of SMY

## Target structure

- Autonomous Mobility
- Safety and Motion
- Architecture & Networking
- Software & Central Technologies

UX (agility, accessibility, speed)

- AM
- AN
- SCT

<sup>1</sup> January 2024, the former Smart Mobility business area was dissolved into AM, AN and SCT.

# FOCUS User Experience – Continental as Best Owner?

Highly attractive business



Strong order intake momentum



Leading market position in display solutions, head-up and digital cluster



Highly innovative



Carve-out initiated to create strategic options

Hardware-focused business



Significant investment needs



Not an integral part of our software-defined-vehicle strategy







# PERFORM

# PERFORM Strict Profitability Management

Operating leverage

A

- › Increase content per vehicle and new business models
- › Commercial excellence

Up to 1% of sales short-term

Operational excellence

B

- › Manufacturing improvements

Up to 1% of sales short-term

Fixed-cost reduction

C

- › Organizational delayering
- › Bundling of activities

~€400 mn by 2025e

R&D efficiency

D

- › Consolidation
- › Best-cost locations
- › Raise software development synergies

Up to 1% of sales short-term

# PERFORM Manufacturing Footprint Today

Production plants<sup>1</sup>

## AMERICAS

13

### Brazil

- › Guarulhos
- › Varzea Paulista
- › Jacutinga (AN)

### Mexico

- › Aguascalientes
- › Guadalajara Periferico
- › Guadalajara Tijera
- › Las Colinas
- › Nogales\*
- › San Luis Potosi
- › Silao

### USA

- › Culpeper\*
- › Morganton
- › New Braunfels

## EUROPE

25

### Belgium

- › Mechelen

### Czech Republic

- › Adrspach
- › Brandys
- › Frenstat
- › Jicin

### Germany

- › Babenhausen\*
- › Frankfurt
- › Gifhorn\*
- › Ingolstadt
- › Karben\*
- › Regensburg
- › Rheinboellen
- › Villingen

### France

- › Toulouse

### Great Britain

- › Ebbw Vale

### Hungary

- › Budapest
- › Veszprem

### Italy

- › Cairo Montenotte

### Lithuania

- › Kaunas

### Portugal

- › Vila Real

### Romania

- › Sibiu
- › Timisoara

### Serbia

- › NoviSad (2)

### Slovakia

- › Zvolen

## APAC

18

### China

- › Changchun Moonlake
- › Changsha
- › Changshu
- › Chongqing
- › Jinan
- › Lian Yun Gang
- › Shanghai
- › Shanghai SABS
- › Suzhou
- › Wuhu Longshan
- › Qufu

### India

- › Bangalore
- › Gurgaon

### Japan

- › Hamakita

### Malaysia

- › Penang

### Philippines

- › Calamba

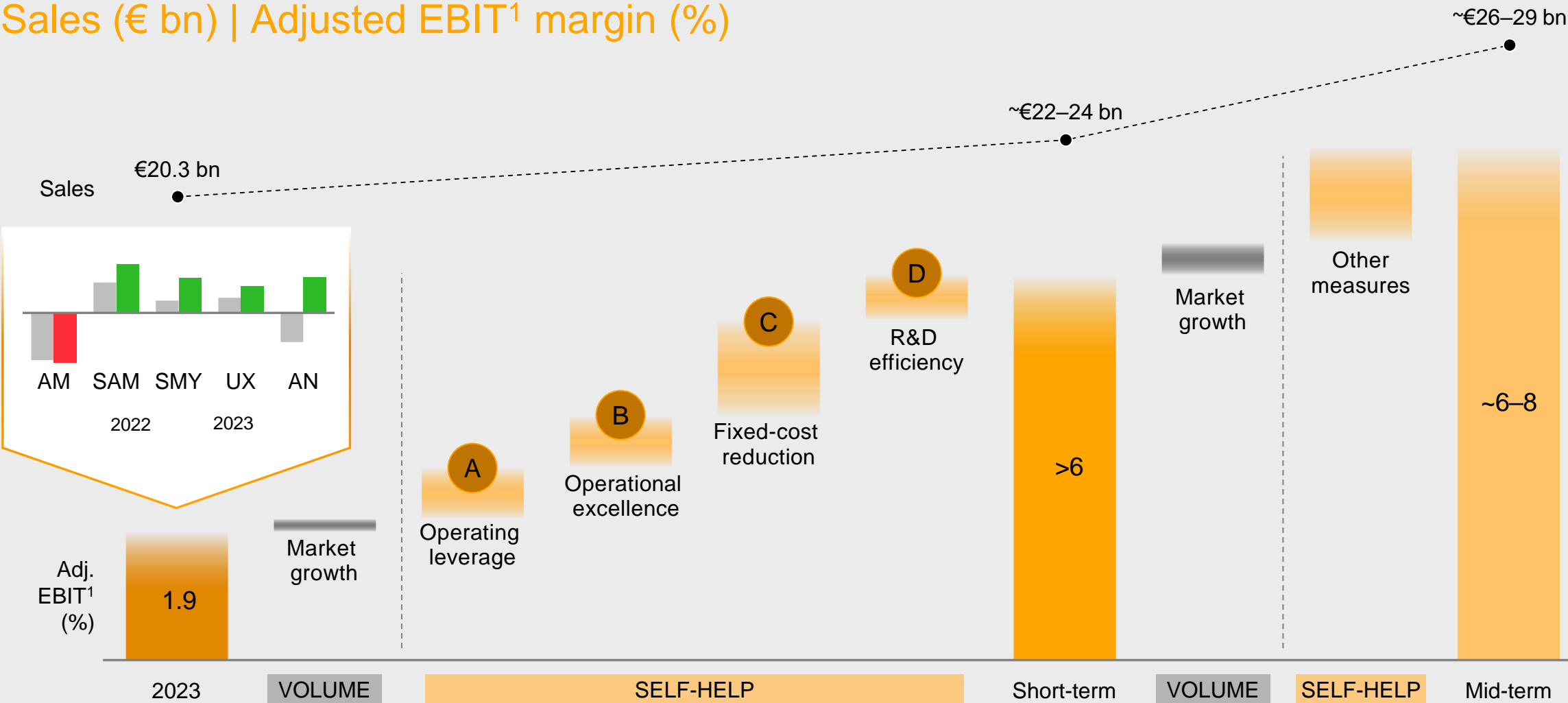
### South Korea

- › Sejong

<sup>1</sup> As at December 31, 2023, \*As part of 2019-29 footprint optimization program – in progress to exit.

# PERFORM Profitability Target

Sales (€ bn) | Adjusted EBIT<sup>1</sup> margin (%)



<sup>1</sup> Before amortization of intangibles from PPA, changes in the scope of consolidation (only 2023), and special effects. Considering current portfolio.

# BA Autonomous Mobility (AM)

## Mission:

Delivering innovative and sustainable full-stack mobility solutions for everyone's autonomy tomorrow



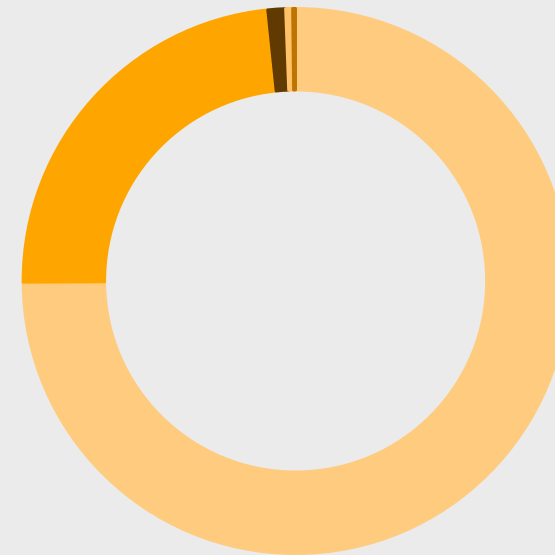
**€2.3** billion  
in sales

+ ~ €1.1 bn from SMY<sup>1</sup>



**~11,600**  
employees

+ ~ 6,400 from SMY<sup>1</sup>



- Radars
- Cameras
- AD control units
- System and software
- High-resolution lidars

+ SMY<sup>1</sup> commercial vehicle portfolio

## Become a leading autonomous mobility supplier

Data shown as at December 31, 2023. <sup>1</sup> SMY allocated to the BA AM based on FY 2023 results. SMY dissolved as at December 31, 2023.

# LEAD – BA Autonomous Mobility

## Our Aspiration

### Technology Leadership

Components and systems supplier of choice for passenger car solutions and L4 autonomous trucking.



### Value Management

Strategically investing in system business, leverage our core & deliver new value.



### Our Approach

Effectively reinforcing our strengths and key partnerships to deliver unique value fast and efficient.



## Our Key Capabilities

### Components expertise and industrialization

Cutting-edge technologies in components portfolio.

### Industry first hardware-as-a-service solution

L4 service model system with Aurora.

### ADAS & autonomous system design

Enhancing key value across the vehicle.

### Software competence

From driving functions to middleware and computer vision solutions.

### Diversified market know-how and access

From passenger cars to commercial vehicles.

### Global footprint

R&D and manufacturing in the market for the market.

# AM – Exclusive Partnership with Aurora

Business highlight

## 1 Our Customers' Needs:

- › The transportation industry challenges:
  - › Cost increases
  - › Scarcity of drivers
- › Results in strong demand for innovation in the transportation industry that is commercially valuable

## 2 Our Solution:

- › Continental and Aurora partner to industrialize the first commercially scalable autonomous L4 trucking system
- › Including a new fallback system which is designed to ensure a driverless truck reaches a safe position in the unlikely event of a failure in the primary autonomy system



**Chris Urmson, CEO Aurora**  
*“Continental’s legacy in development and industrialization of automated driving systems, combined with its commitment to transform transportation make it an ideal partner for Aurora. Their depth of expertise will be pivotal to scaling Aurora’s autonomous trucking service, Aurora Horizon.”*

## 3 Our Value Proposition:

- › Leveraging our expertise and competence in:
  - › Development of safe, reliable, and scalable system solutions
  - › Benefiting from industrialization capabilities
- › Delivering the entire hardware set including a new fallback system

## 4 Our Business Success:

- › New business model – “hardware-as-a-service” we will be paid for hardware and related service for each mile driven by the autonomous trucks
- › Start of production – 2027 in the US market

## 5 Our Proof Points:

- › Continental and Aurora reach key development milestone of exclusive partnership: Completion of blueprint and design of the future Aurora Driver hardware and fallback system
- › Both companies release a roadmap to the planned start of production in 2027 based on detailed development plans and key milestones

# BA Architecture & Networking

## Mission:

We provide the backbone of the intelligent and connected vehicle



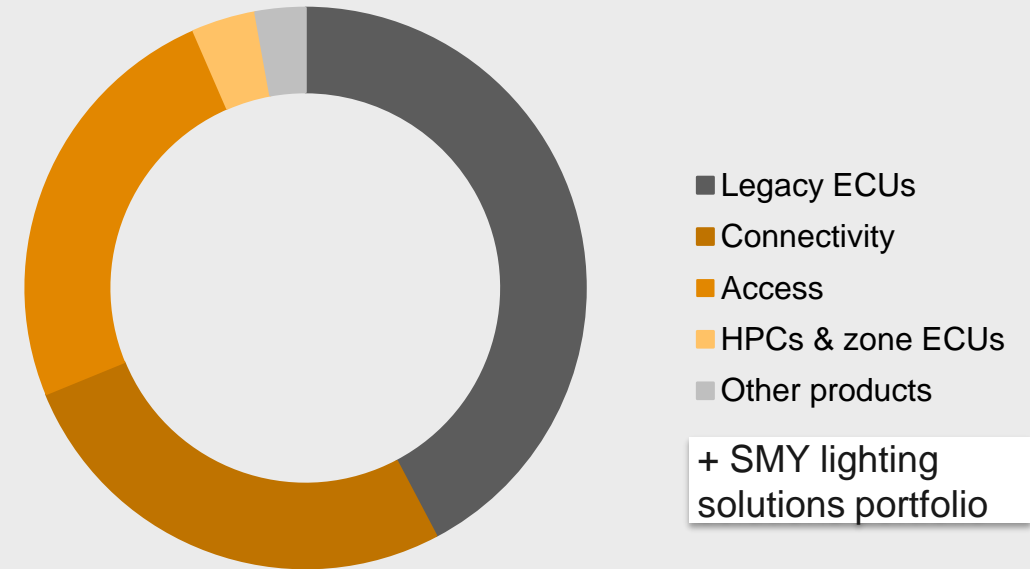
**€4.0** billion  
in **sales**

+ ~ €0.5 bn from SMY<sup>1</sup>



**~21,300**  
employees

+ ~ 2,200 from SMY<sup>1</sup>



## Leveraging legacy to create value for future architecture needs

Data shown as at December 31, 2023. <sup>1</sup> SMY allocated to the BA AM based on FY 2023 results. SMY dissolved as at December 31, 2023.



# LEAD – BA Architecture & Networking

## Our Aspiration

### Technological Leadership

Enabling seamless connectivity and modern, high-performance electronics architecture in the vehicle



### Value Management:

Domain or cross-domain complete stacks, leveraging software business and services across the vehicle's lifecycle



### Our Approach:

Trusted partner to our customers in their transformation to the software-defined vehicle



## Our Key Capabilities

### Scalable development and testing toolchains

Speed and robustness to software development and integration

### Partner for vehicle compute solutions

HPCs and zones  
(domain and cross-domain: cockpit, AD, body, chassis)

### Innovative pioneer in vehicle access solutions

Seamless, digital access and engine start solutions

### Connected

Telematics solutions, enabling road to cloud connectivity

### Software as a product

Pipeline of mature and innovative software assets

### Integration management experts

Across the lifecycle of the vehicle

# AN – High Performance Computers

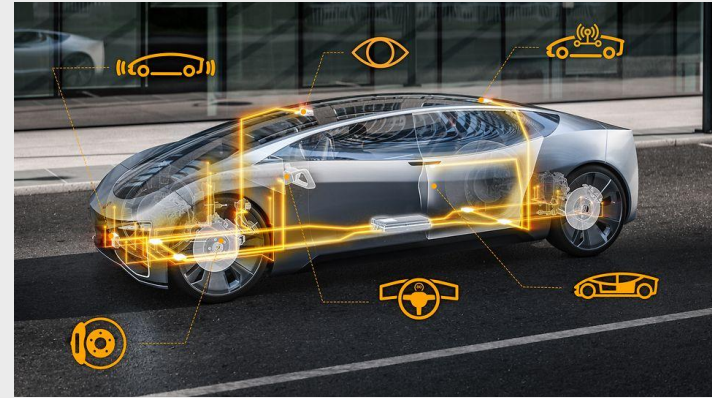
Business highlight

## 1 Our Customers' Needs:

- › Manage complexity
  - › Foundation architecture - central and zonal
  - › Variant management and 3rd party SW suppliers
- › Integrate and orchestrate 3rd party content
- › Connected and up to date seamlessly and securely
- › Tap into new revenue streams across the life of the vehicle

## 2 Our Solution Examples:

- › Plug & Play HPC
  - › Scalable and flexible concept for highly integrated cross-domain HPC solutions
- › Smart Cockpit HPC
  - › Ready to use solution which balances the demands between user experience, cost, and system performance



## 3 Our Value Proposition:

- › Plug & Play
  - › Simple exchangeability and upgradeability of HPC modules pre and post SOP
  - › Innovative cooling solution with a flexible and cost-efficient cooling pad
- › Smart Cockpit
  - › Developed within 18 months
  - › Allows visual ADAS integration (360° camera) and Driver Monitoring System (DMS)

## 4 Our Business Success:

- › Producing and integrating HPCs at scale since 2019
- › First supplier to be able to integrate all vehicle domains – strategic cost savings to our customers while delivering key value out of one hand

## 5 Our Proof Points:

- › First supplier worldwide to successfully bring to market a Body HPC as a fully functioning high-performance - secured server hosting software functions and services
- › Depth of expertise across the complete architecture, from road to cloud, makes Continental the partner of choice for many of our customers

# BA Safety & Motion (SAM)

## Mission:

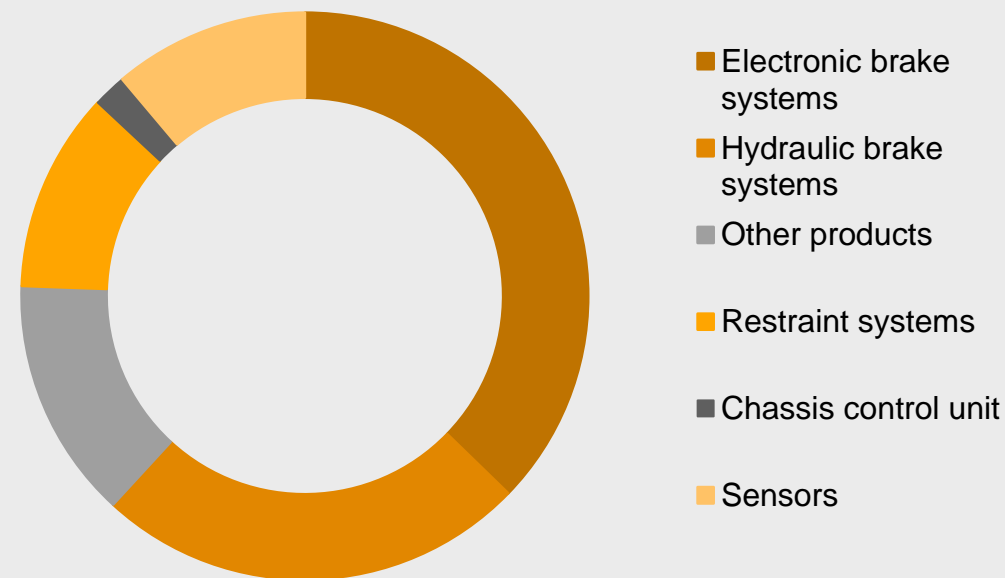
We work every day to **make mobility safer** in a changing world. Our purpose to **deliver leading solutions** meets passion to contribute to every life in a sustainable world.



€7.6 billion  
in sales



~36,800  
employees



## Delivering leading safety and motion technology at scale

Data shown as at December 31, 2023.

# LEAD – BA Safety & Motion

## Our Aspiration

### Technological Leadership

Leverage our unique understanding of the individual components to the complete system to deliver innovative safety and motion solutions



### Value Management:

Continuously improve our competitiveness by questioning status quo and efficient processes



### Our Approach:

Create value with our strong core products while tapping into new profit pools



## Our Key Capabilities

### Sensor technology and control units

Market leading solutions at scale

### Innovative brake systems

Leading-edge technology in electronic brake systems

### Motion control solutions

Full system supplier for Holistic Motion Control

### Operational excellence

Worldwide footprint, efficient prototyping to mass production

### System integration competence

Experts in vertical and horizontal integration

### Close to all key customers, globally

# SAM – Future Brake Systems

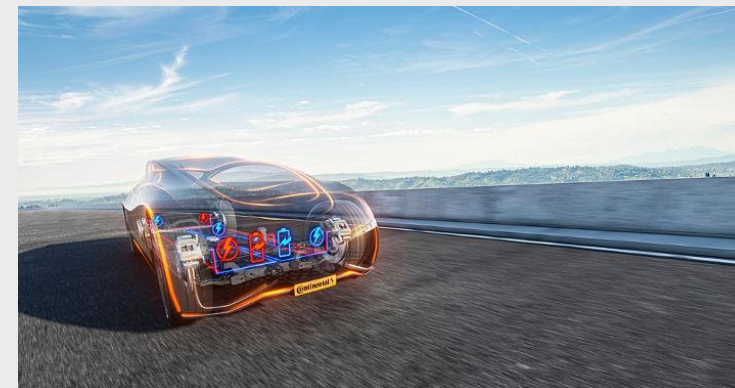
Business highlight

## 1 Our Customers' Needs:

- › **Mobility users:** Vehicles that come to a full stand still, safely, comfortably and controlled
- › **OEMs:** Modular plug & play design, simplified handling and maintenance packaged in a more sustainable product

## 2 Our Solution Examples:

- › Modular and stepwise approach
  - › FBS 0: Wet
  - › FBS 1: Wet-by-wire (electric pedal)
  - › FBS 2: Semi-dry by-wire (dry rear axle)
  - › FBS 3: Full-dry by-wire (electric pedal; dry front & rear axle)



## 3 Our Value Proposition:

- › ~20 years of expertise in brake-by-wire systems
- › Digitalized, electrified, automated vehicles: Continental's innovation roadmap for brake systems drives the evolution of brake controls to motion systems tailored for each next generation of vehicle needs
- › Supports our customer's environmental goals

## 4 Our Business Success:

- › First to market with semi-dry brake system - decoupled software from hardware for flexible system solutions
- › Simplified assembly with proven hydraulic fallback (FBS 2) enables removal of brake fluid on the rear axle and reduced system/vehicle costs for our customers

## 5 Our Proof Points:

- › FBS 0: Successfully launched MK C1 brake system in 2016 and 2nd generation MK C2 in 2022/23
- › FBS 2: Major award for semi-dry brake system (>2 bn euros in lifetime sales) with start of production planned with a global car manufacturer beginning 2026
- › Electric caliper concept release planned for end of 2024

# BA Software & Central Technologies

## Mission:

We anticipate, unify and deliver building blocks for today and tomorrow's mobility



€0.4 billion  
in sales

+ ~€1.1 bn from SMY<sup>1</sup>



~6,700  
employees

+ ~1,700 from SMY<sup>1</sup>

## Our portfolio:

### Internal services:

- › **Technology, innovation and strategy**
  - › Software-defined vehicle: EE architecture, software and system solutions
  - › Research and advanced engineering
  - › Sustainability
- › **SCT core**
  - › House of solutions
  - › CAEdge
  - › Reusable modules
  - › R&D footprint management
  - › AI empowered company

### External business:

- › Elektrobit (OS and middleware)
  - › Argus (cybersecurity)
  - › CES (engineering services)
- + SMY aftermarket portfolio

**We are the strategic accelerator for our internal & external partners**

Data shown as at December 31, 2023. <sup>1</sup> SMY allocated to the BA AM based on FY 2023 results. SMY dissolved as at December 31, 2023.

# LEAD – BA Software & Central Technologies

## Our Aspiration

### Technology Leadership:

Anticipate future vehicle architectures and technologies to master the transformation toward software-defined vehicle



### Value Management:

Enable software business and foster cross-business-area collaboration



### Our Approach:

Leverage our core competences in advanced engineering, AI and systems integration, together with strategic partners



## Our Key Capabilities

### Vehicle architecture consulting

Trusted partner to prepare the future

### OS, middleware and cybersecurity

Elektrobit and Argus solutions

### Reusable modules / process methods and tools

Increase R&D efficiency within Continental Automotive

### System and AI

System thinking across domain, AI empowered sensor and feature fusion

### CAEdge\* as software enabler

Virtualization for shorter time to market.  
CI/CT/CD\*

### Partnerships and ecosystems

Flexibility and speed to create competitive edge

\*CAEdge: Continental Automotive Edge Framework, CI: Continuous Integration, CT: Continuous Testing, CD: Continuous Development, AI: Artificial Intelligence

# BA User Experience (UX)

## Mission:

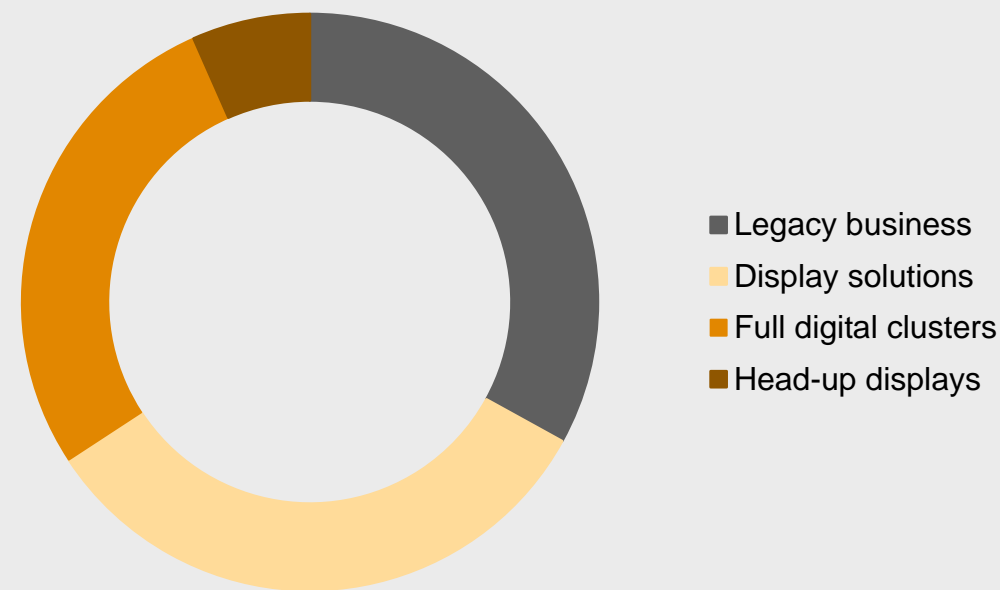
Our passion for technology makes your difference



€3.5 billion  
in sales



~14,900  
employees



## Our innovations bring the differentiating factor for our customers

Data shown as at December 31, 2023.



# LEAD – BA User Experience

## Our Aspiration

**Technological Leadership**  
Most innovative supplier enabling differentiation



**Value Management:**  
Best cost base with exceptional commercial management



**Our Culture: Stronger Together!**  
Living ownership while leveraging team approach



## Our Capabilities

**Innovation teams as partner of OEM design teams creating holistic experiences**

**Deep Display & HUD and UX Software know-how**

**Deep manufacturing expertise & process development**

**Mega-factories bundling volume and know-how**

**Launch of complex large display solutions**

**Close to all key customers**

# UX – Display Solutions

Business highlight

## 1 Our Customers' Needs:

- › **End Users:** User Experience (UX) is the new horsepower and key buying criteria
- › **OEMs:** Key differentiation point and meet end customers expectation for a new level of in-cabin experience

## 2 Our Solution Examples:

- › Curved ultrawide display
- › Scenic view head-up display
- › Scalable from high-end to mid-class
- › Empower the experiences with exciting use cases driven by our software.



## 3 Our Value Proposition:

- › Cutting-edge premium solutions that are also scalable for mid-class volumes
- › Mega-factories maximizing our return on investment

## 4 Our Business Success:

- › We are the partner of choice for high-end, innovative future cockpits
- › We successfully convert innovation to scale for the mid-class price point

## 5 Our Proof Points:

- › Highest order intake in the industry
- › Proven our product concept in providing the ultrawide display in Mercedes Benz concept car EQXX
- › Awarded with a high-volume mass production product development of a pillar-to-pillar touch display
- › CES innovation award 2023 for the Scenic View HUD

# Automotive Clear Path to Value Creation

➤ We are the technology provider and system integrator of choice for the software-defined vehicle

➤ We are in the market for the market

➤ We strictly execute our 3-pillar strategy to drive profitable growth

**We drive the future of mobility**

# Agenda

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1	Continental Group	3
2	Automotive Group Sector	16
<b>3</b>	<b>Tires Group Sector</b>	<b>52</b>
4	ContiTech Group Sector	67
5	Corporate Governance	89
6	Sustainability	95
7	Financials	106
8	Back-up	119

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# Tires at a Glance

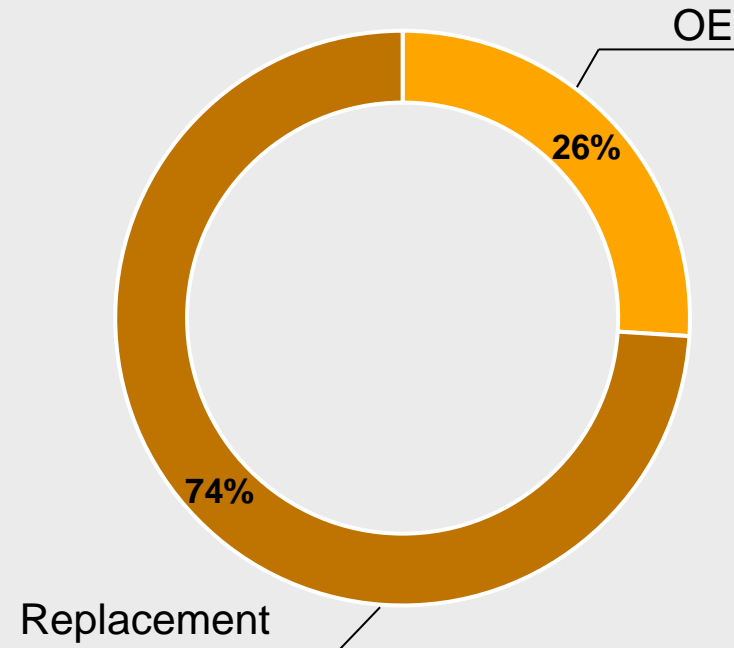


€**14** billion  
in **sales**

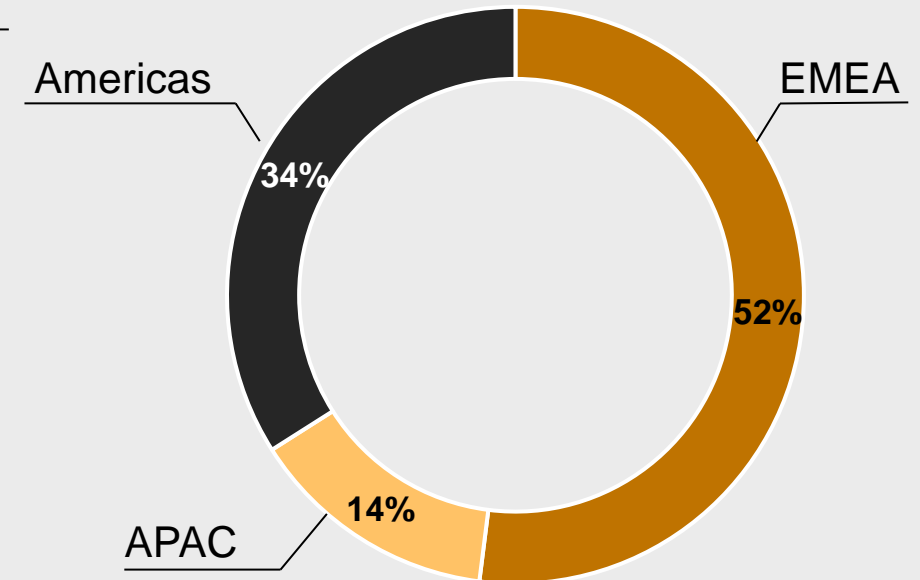


~**56,500**  
employees

High share of RE business  
on the back of a strong OE  
business



Regional balance with  
significant growth opportunities  
in Americas and APAC



**Tires are our passion. We outperform the industry with customer-centric solutions and operational excellence.**

Data shown as at December 31, 2023. RE: Replacement market, OE: Original Equipment market

# Tires Vision 2030

**Tires are our passion.  
We outperform the  
industry with customer  
centric solutions and  
operational excellence.**

**VISION**  
2030

## OUR CORE

Excellent tires remain our DNA. We stand for profitable growth, reaching a podium position in the tire industry.

## OUR OPPORTUNITY

We will be the #1 tire solution provider.

**Our customers'  
ambitions are  
our driving  
force.**

## OUR RESPONSIBILITY

We will be the most progressive tire company in being environmentally and socially responsible.

## OUR TEAM

We are Tires. Each and every one of us takes ownership. We will win as one global team.

# Tires Vision 2030

## Strategically Enhancing Our Successful Business Model

### Differentiation / Growth

Balance global footprint and strengthen service network



Expanding value-adding digital solutions business



Sustainable solutions along the entire value chain



Above-average growth in high-value products



VISION  
2030

### Excellence / Efficiency



Industry-leading quality and operational efficiency



Top-notch technology and product portfolio



Strong brand equity with effective application of multi brand portfolio



Excellent supply chain performance and flexibility

# CORE Industry-Leading Operational Excellence

~80%



Capacity in mega plants (>100kt p.a.)<sup>1</sup>

~75%



Best-cost locations<sup>1</sup>

<8



Customer satisfaction (measured in OE ppm)<sup>2</sup>

**Operational excellence is the foundation of our financial performance**

<sup>1</sup> As at December 31, 2023, in tonnage (total tires). <sup>2</sup> ppm: parts per million, average 2018–2023



# CORE Major Benefits of Electrification

## Accelerating opportunities from EVs

- › BEV characteristics drive higher demand for UHP tires
- › OE favor premium tires meeting quality and technology requirements
- › “OE to replacement” consumer brand loyalty higher for BEV

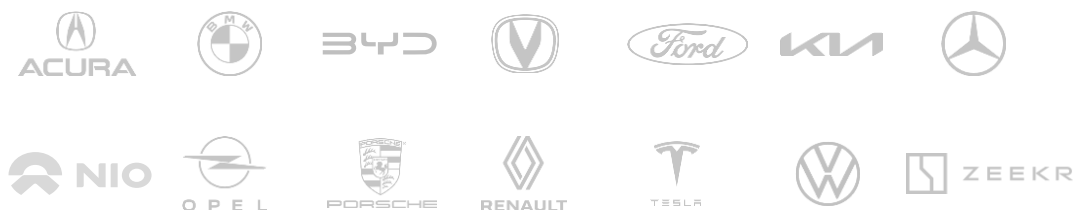


## Driven by our strong OE market position

Continental BEV homologations (total)



All the world's most successful BEV manufacturers trust Continental tires

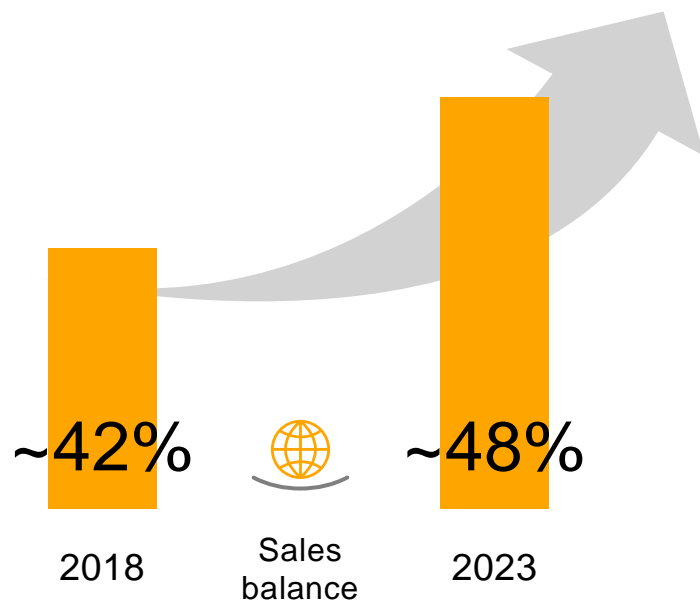




# CORE Seizing Growth Opportunities in APAC and Americas

Increasing global presence

Sales share of APAC and AM regions



Supported by continued investment in our manufacturing and supply chain set-up



~€1.6 bn  
invested in APAC/AM plants<sup>1</sup>

Plant expansions

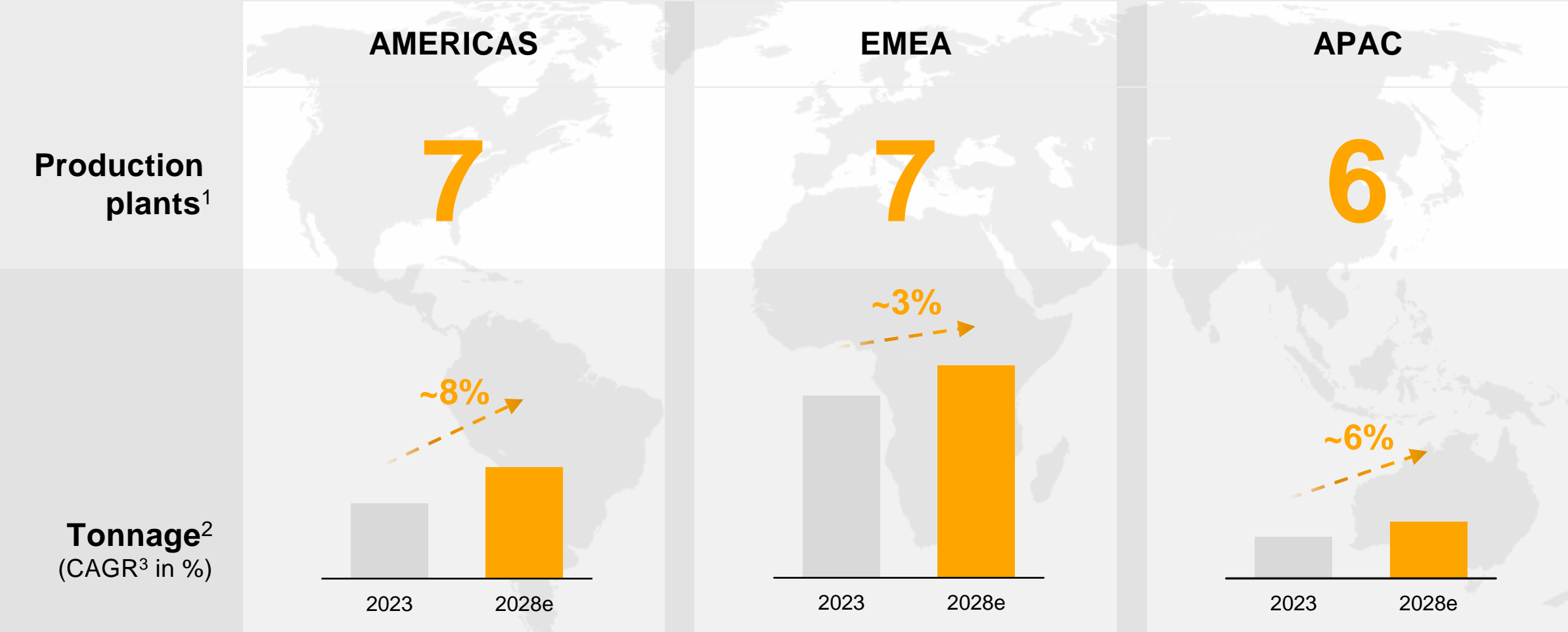
- › Hefei (China)
- › Rayong (Thailand)
- › Clinton (USA)
- › Camacari (Brazil)



**Greater manufacturing responsiveness and solutions tailored to local requirements underpinning our customer centricity**

<sup>1</sup> Figures relating to 2018–2023 period.

# CORE Manufacturing Footprint



<sup>1</sup> As at December 31, 2023, excluding plants for semi products and retread production facilities. <sup>2</sup> Estimated production tonnage (in k ton for all tires). <sup>3</sup> CAGR: Compound annual growth rate

# Responsibility

We have evolved the way we view and structure our strategic sustainability efforts.

## FROM Linear view



## TO Circular view



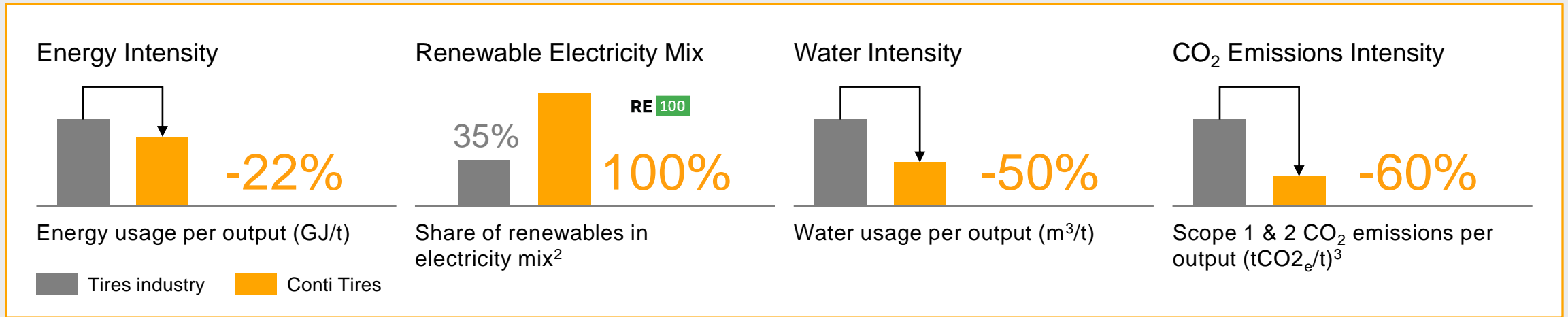
# Responsibility

We remain strongly committed to our agreed ambitions. By 2050 at the latest, we strive for...



# RESPONSIBILITY Ambitious Sustainability Roadmap as Key Differentiator

Example: Industry benchmark 2022 – Operations<sup>1</sup>



Our aim is to be the most environmentally and socially responsible tire company

- › Leveraging global economies of scale
- › Differentiating through technological leadership
- › Increasing efficiency gains
- › Actively turning challenges into opportunities

<sup>1</sup> Comparing to World Business Council for Sustainable Development (WBCSD) Tire Industry Project (TIP): average value of 10 leading tire companies.

<sup>2</sup> Member of RE100 initiative that fosters the use of renewable energy. Use of energy attribute certificates starting 2020 leading to carbon neutral electricity supply. <sup>3</sup> Driven by RE100 electricity mix.

# OPPORTUNITY Integrated Solutions for Fleets

In-house automotive expertise as unique differentiator in tires industry

Holistic data-driven fleet management solutions for commercial customers

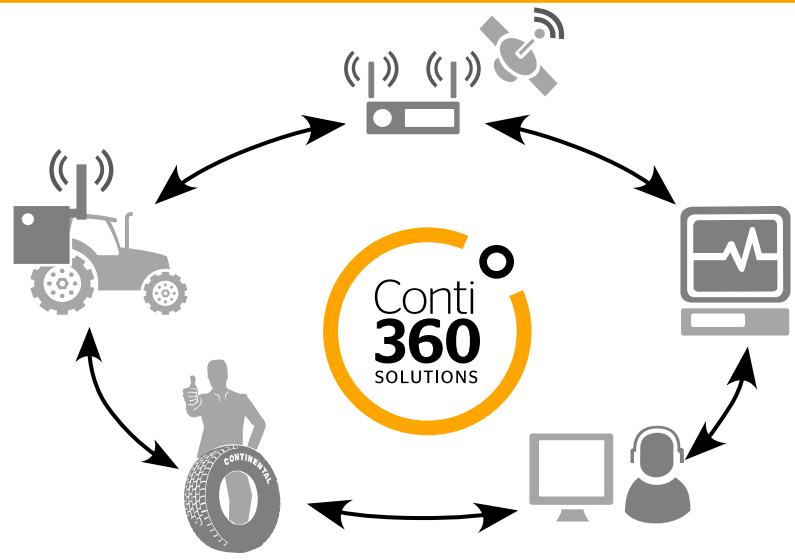
Electronics & sensors portfolio



Fleet management solutions



Remote vehicle diagnostics

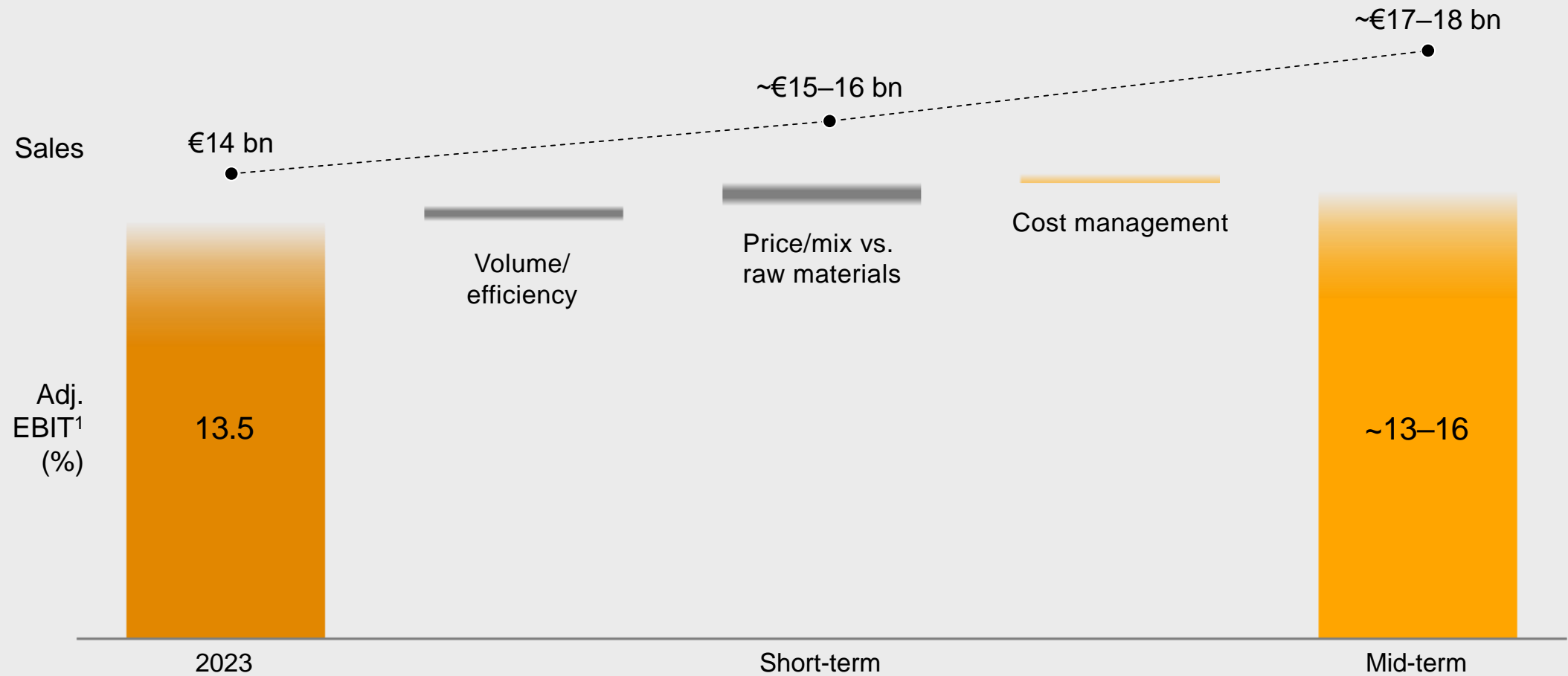
**LODC**  
Lowest Overall Driving Cost

- ✓ Create joint value
- ✓ Create pull effects for our business

- Avoid breakdowns
- Maximize tire mileage
- Save on fuel consumption
- Make service plannable
- Ease operations
- Suggest best fit tire



# Tires Financial Outlook – Updated Mid-term Targets



<sup>1</sup> Before amortization of intangibles from PPA, changes in the scope of consolidation (only 2023), and special effects. Considering current portfolio.

# Tires Clear Path of Continued Value Creation

- Highly resilient business outperforming regardless of the circumstances
- Industry benchmark in value creation and cash generation performance
- Effective capital allocation in strategic profit pools

**Well-positioned industry leader to continue reliable outperformance in the future**

# Agenda

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1	Continental Group	3
2	Automotive Group Sector	16
3	Tires Group Sector	52
<b>4</b>	<b>ContiTech Group Sector</b>	<b>67</b>
5	Corporate Governance	89
6	Sustainability	95
7	Financials	106
8	Back-up	119

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# ContiTech at a Glance

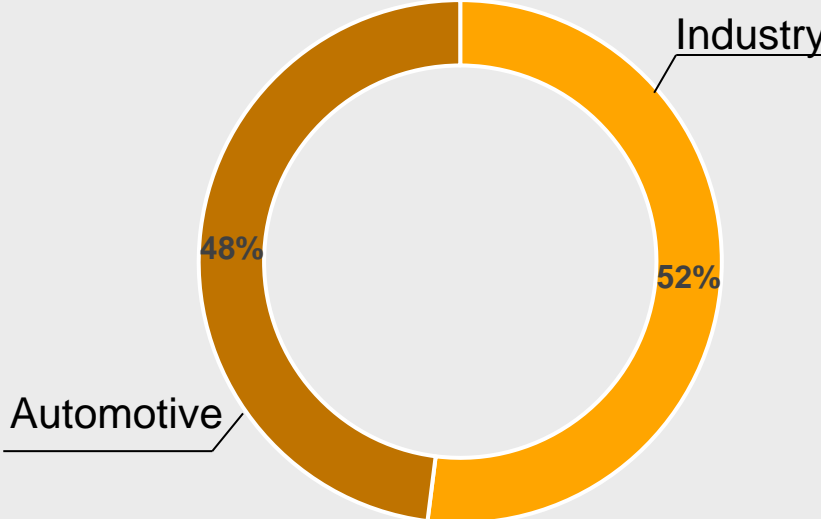


€ **6.8** billion  
in **sales**

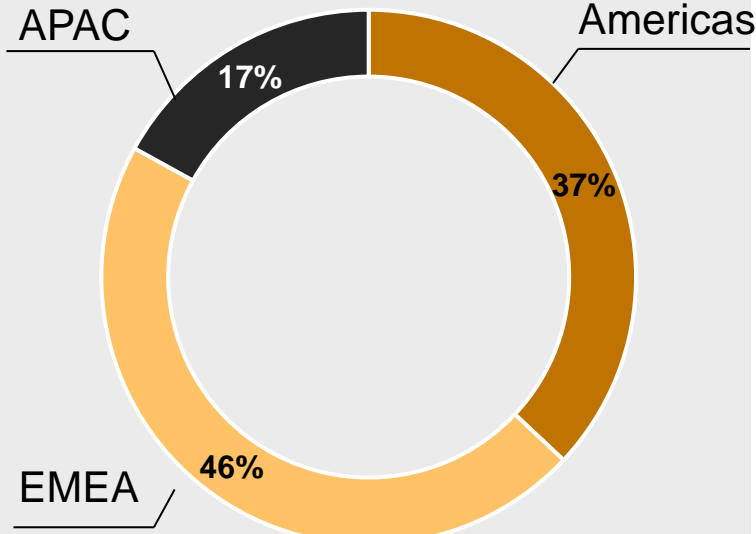


~**42,000**  
employees

Mixed portfolio with significant growth potential in industry



Regional balance with significant growth potential in APAC



**First choice for material-driven solutions**

Data shown as at December 31, 2023.

# Our Exciting Markets

## Industry 52%



Construction & Home



Mining Industry & Quarries



Energy Management



Off-Highway Mobility



Material Handling & Manufacturing



Printing & Packaging Technology



Commercial Vehicles



ICE Passenger Vehicles



Electric Passenger Vehicles

## Automotive 48%

# Our Exciting Markets

## Industry 52%

**Surface solutions**  
**Industrial fluid solutions**

- › Hoses

**Belts, Compounding Tech**

Construction & Home

**Conveying solutions**

- › Conveyor portfolio
- › Belts
- › Services

Mining Industry & Quarries

**Mining solutions**

- › Belt portfolio & monitoring services
- › Conveying solutions

**Wind Industry solutions**

Energy Management

**Surface Solutions Powertrain**

- › Engine mounts
- › Belts
- › Prop shaft bearings

**Cabin & Interior**

- › Vibration absorber
- › Seat & cabin suspension

**Chassis and Body**

- › Bearings & bushings

**Systems**

**Fluid Solutions**

- › Emission reduction & thermal solutions

Commercial Vehicles

**Surface Solutions Belts**

- › Electric power steering
- › Active cinematics control (steering of rear axle)

- › Electric parking brakes

- › Seat belt systems

**Fluid Lines**

- › Air Conditioning
- › Emission reduction lines

ICE Passenger Vehicles

**Surface Solutions Motor mounts**

- › “Four-leg-bushing” for acceleration and recuperation

- › Secondary systems

- › Double insulation

- › Pivot mount: 3-point & vertical layout

- › Battery pack and eCompressor mounts

**Thermal solutions**

- › Fluid lines

Electric Passenger Vehicles

**Powertrain**

- › Mounts

**Chassis and body**

- › Bushings, air actuators

**Cabin and interior**

**Suspension solutions**

Off-Highway Mobility

**Conveying solutions**

- › Conveyor portfolio, belts

**Technical fabrics**

- › Membranes, fabrics, plastics

Material Handling & Manufacturing

**Printing**

- › Printing blankets, flexographic plates & sleeves, rollers, drive belts

**Compounding technology**

Printing & Packaging Technology

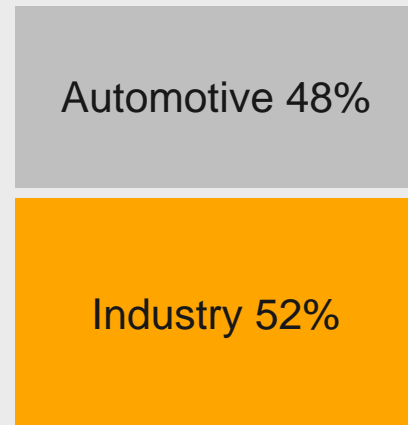
## Automotive 48%

Examples only from the complete portfolio.

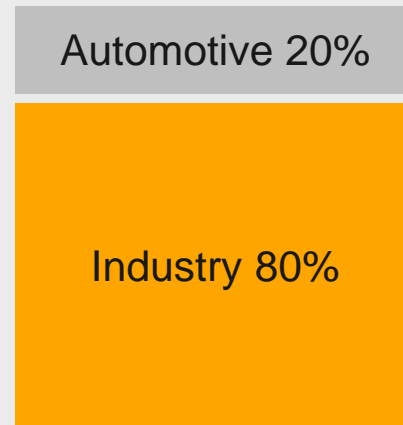
# 2024+ Era of Execution

## Strengthening industry

2023



Ambition

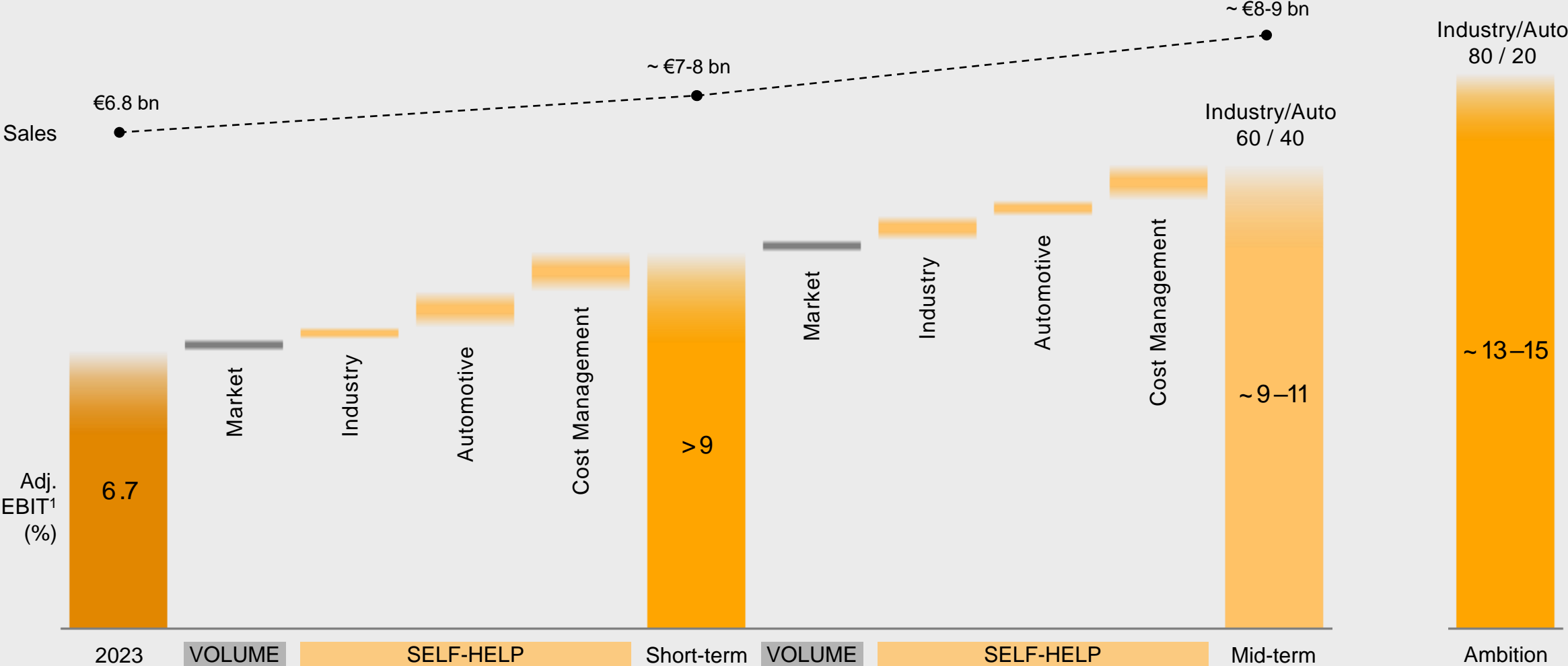


Why do we shift to industry?

- › High-quality business
- › Broader revenue streams
- › Longer product life cycles
- › Less cyclical
- › Seizing new growth opportunities

**Enhancing value creation through targeted capital allocation**

# ContiTech Financial Outlook – Mid-term Targets



<sup>1</sup> Before amortization of intangibles from PPA, changes in the scope of consolidation (only 2023), and special effects. Considering current portfolio.



The background image is a composite of industrial and energy-related scenes. On the left, there are several wind turbines in a field. In the center, there's a construction site with cranes and buildings under construction. On the right, there's a large industrial facility with tall chimneys and storage tanks. In the foreground, a white hydrogen truck is driving on a road, with the word 'HYDROGEN' visible on its side. The entire scene is overlaid with a semi-transparent grey band where the word 'INDUSTRY' is written in large, bold, orange letters.

# INDUSTRY

# Industry Clear Strategic Direction

## Strengthening industry

Ambition



How will we do it?

### Continue to grow

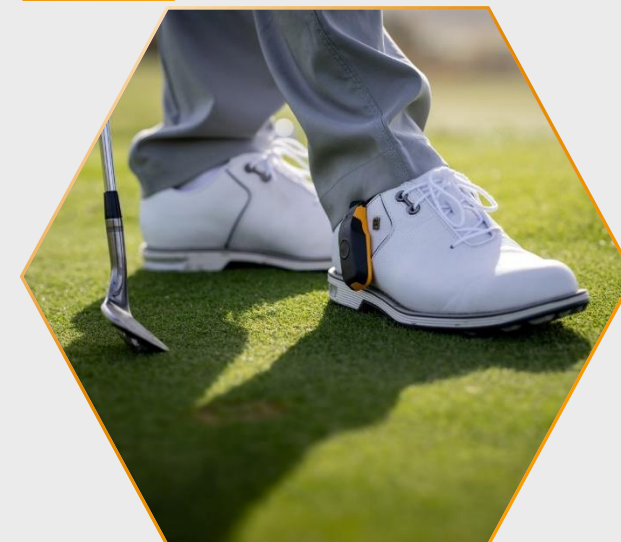
- › Organically
  - › Increasing market penetration
  - › Expansion of product portfolio
  - › Developing market presence
  - › Diversifying through venture units
- › Inorganically through M&A

Ramping up hydraulic greenfield in Mexico

Capturing share in replacement

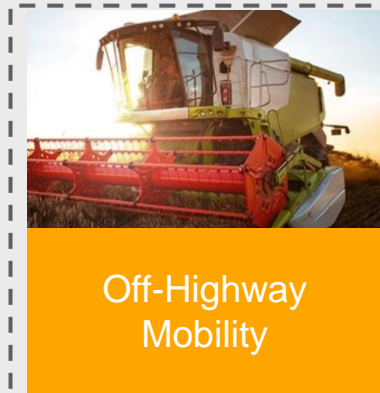
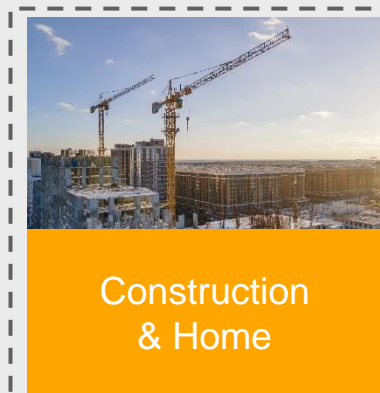
Growing APAC sales

BAL.ON



# Strengthening Industry Focus on our Growth Fields

## Industry 52%



## Automotive 48%

# Industry Growth Engine Construction & Home

Total addressable market:

Value 2023–2028e

€6.5–7 bn

Growth CAGR

2%

ContiTech sales:

Sales share 2023

8%

Growth CAGR 2023–2028e

6%

Expansion, renewal and upgrade of residential, commercial and infrastructure

Our advantage:

High demand for efficient material handling solutions and advanced materials



Our levers:

- › Extremely compatible with existing solution portfolio
- › Leading position in surface solutions such as sustainable coverings with great functions in awarded designs

Total addressable market: Based on internal research. CAGR: Compound Annual Growth Rate

# Construction & Home Surface Solutions

Business highlight

## 1 Our Customers' Needs:

- › Extremely reliable and durable surfaces to meet the challenging in-use environment (e.g. heat resistance, rip protection, solar protection etc.)

## 2 Our Solutions for Home & Garden and Construction:

- › Innovative surface solutions for interior and exterior
- › Interior living
  - › Kitchen / furniture films
- › Exterior living
  - › Coatings for window profiles and window frames
  - › Coatings for front and garage doors
  - › Façade foil for customized façade design



## 3 Our Value Proposition:

- › Extremely compatible with existing solution portfolio – product extension out of successful automotive business
- › Leading position in sustainable surface, technically advanced and designer solutions

## 4 Our Business Success:

- › Market introductory phase
- › In active discussion with key customers with strong potential

## 5 Our Proof Points:

- › European Green Award 2023 in the category "Green Product – Interior"
- › Success in the automotive space with strong carryover

# Industry Growth Engine Energy Management

Total addressable market:

Value 2023–2028e

€2–2.5 bn

Growth CAGR

5%

ContiTech sales:

Sales share 2023

9%

Growth CAGR 2023–2028e

5%

## Transformation toward efficiency, decarbonization and localization

Our advantage:

High demand for collaboration to develop game-changing solutions fast



Our levers:

- › Partnering with key players gives us a speed-to-market advantage
- › Elevating technological progress via adapted solution portfolio

Total addressable market: Based on internal research. CAGR: Compound Annual Growth Rate

# Energy Management Ammonia Hoses

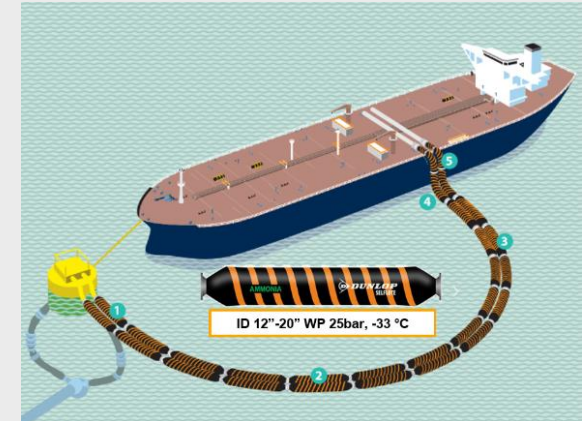
Business highlight

## 1 Our Customers' Needs:

- › Efficient and safe handling of ammonia with extensive technical requirements e.g. pressure and temperature, corrosiveness and leak prevention
- › Ammonia use cases:
  - › Potential alternative fuel for ships
  - › Potential energy carrier for hydrogen

## 2 Our Solution:

- › Marine transfer hoses are designed for safe on-loading and off-loading operations
- › Various configurations: i.e. Ship-to-Shore, Ship-to-Ship and Ship-to-Buoy.



## 3 Our Value Proposition:

- › We understand the full value chain, and can leverage our decades of experience across various industrial applications, including the oil, gas as well as in the marine hoses sector
- › Use extensive experience in oil and gas into H2 industry creating customer able to create tailored and industrialize at speed and scale

## 4 Our Business Success:

- › On track for market entry end of 2024
- › Carry-over our competencies in hosing solutions with minor adjustment and most efficient use of our resources
- › Building on our reputation for high quality ContiTech hoses

## 5 Our Proof Points:

- › Our expertise in materials enables us to develop products that meet the evolving, highly technical demands of ammonia supply

# Industry Growth Engine Off-Highway Mobility

Total addressable market:

Value 2023–2028e

€15.5–18 bn

Growth CAGR

3%

ContiTech sales:

Sales share 2023

5%

Growth CAGR 2023–2028e

9%

Demand for technological upgrades, increasing efficiency and new materials drives growth

Our advantage:

Strong demand for high-performance, long-lasting, easy-to-maintain, lightweight products



Our levers:

- › Partnering with OEs to set standards
- › Elevating technological progress via tech transfer from commercial vehicles

Total addressable market: Based on internal research. CAGR: Compound Annual Growth Rate



# Off-Highway Mobility High-Pressure Hydraulic Solutions

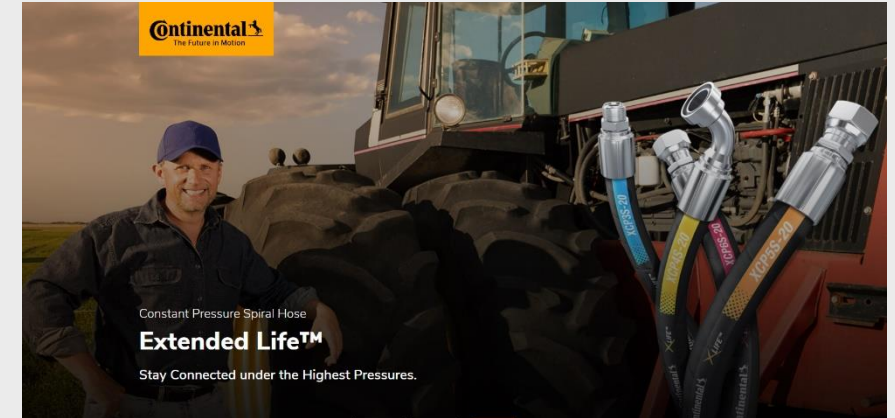
Business highlight

## 1 Our Customers' Needs:

- › High-pressure hydraulic hose solution with abrasion resistant cover and small bend radius requested by agriculture OEMs
- › Reliability essential for operations in very demanding hydraulic systems
- › Fast, safe and cost-efficient assembly of hose solutions in production and field maintenance

## 2 Our Solution:

- › Introduction of top-of-the-line abrasion resistant and flexible hydraulic hose
- › Maintains constant pressure performance in tight spaces
- › Simplified fittings are faster, safer and more cost-effective to operate
- › Global approach between APAC and EMEA regions for design and supply of customer solution



## 3 Our Value Proposition:

- › Superior quality and reliability
- › Extra abrasion resistance with extended life properties
- › Outstanding flexibility even in the tightest situation, requiring half the space (bend radius) as outlined per norm
- › Final design exceeding DIN and SAE test norms, outlasting one million test cycles

## 4 Our Business Success:

- › Won major customer projects with most of the leading Agriculture OEM

## 5 Our Proof Points:

- › Successful cooperation of global ContiTech organization across APAC (production) and EMEA (assembly)
- › OEM customers highly convinced by performance of ContiTech solution and global R&D and manufacturing support and willing to enter business with us

The background is a composite image. In the foreground, a white hydrogen truck with a large cylindrical tank is driving on a road. The tank has 'HYDROGEN' and 'Continental' written on it. In the background, there are several wind turbines on the left, a construction site with cranes in the center, and industrial buildings with smokestacks on the right. The word 'AUTOMOTIVE' is overlaid in large, bold, orange letters across the middle of the image.

# AUTOMOTIVE

# Automotive Clear Strategic Direction

Ambition

Automotive

Increasing profits and selective growth

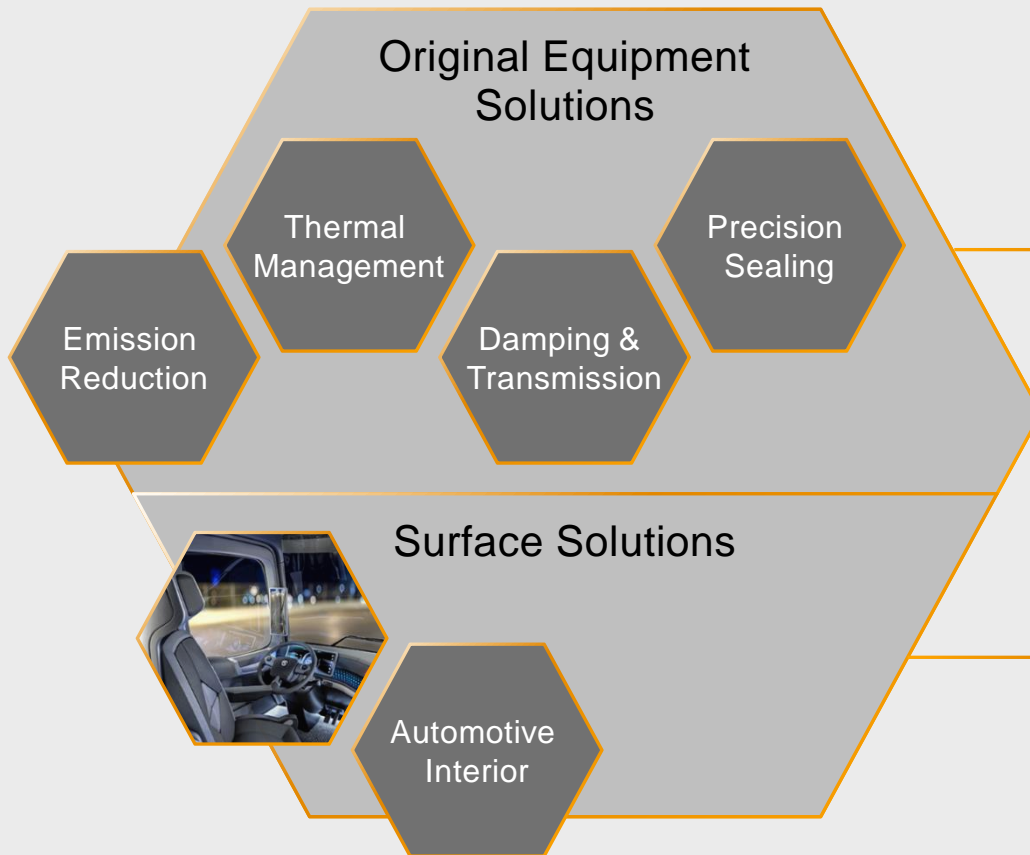
How will we do it?

## Short-term performance improvements

- › Customer and product portfolio measures
- › Strict cost management
- › Limited capital allocation on selective growth areas
- › Legal and physical independence in 2025

## Increasing market penetration

- › Growth with established and emerging players



# Selective Approach Focus on our Growth Field

## Industry 52%



Construction & Home



Mining Industry & Quarries



Energy Management



Commercial Vehicles



ICE Passenger Vehicles



Electric Passenger Vehicles



Off-Highway Mobility



Material Handling & Manufacturing



Printing & Packaging Technology

## Automotive 48%

# Automotive Growth Engine Electric Vehicles

Total addressable market:

Value 2023–2028e

€5.5–18 bn

Growth CAGR

27%

ContiTech sales:

Sales share 2023

4%

Growth CAGR 2023–2028e

21%

## Transition to batteries, new materials and net zero components

Our advantage:

Strong demand for customized technical solutions and unique designs



Our levers:

- › Technical expertise to offer lightweight multi-material and multi-component solutions and stunning interior designs with unique functionality

Total addressable market: Based on internal research. CAGR: Compound Annual Growth Rate

# Electric Vehicles R744 (CO<sub>2</sub>) Refrigerant Lines

Business highlight

1

## Our Customers' Needs:

- › Efficient and sustainable fluid solutions
- › Optimized passenger comfort
- › Extended BEV driving range
- › Holistic system know-how
- › Global production footprint

2

## Our Solution[s]:

- › R744 (CO<sub>2</sub>) air conditioning lines
- › Engineering services for thermal management system development
- › Supporting intelligent combination of heating/cooling and refrigerant circuits, including AC lines, blow molded cooling tubes, e-drive cooling lines and AC compressor isolation system



3

## Our Value Proposition:

Pioneering sustainability:

- › HFC\* /PFA free
- › High-efficiency operation, especially in combination with a heat pump (resulting in extended driving range)
- › Extremely cost-effective refrigerant fluid (compressed natural CO<sub>2</sub>)
- › Conformity to EURO7
- › In-house hose production

4

## Our Business Success:

- › Exclusive market position (1 of 3 serial suppliers)
- › Active OE system development in Asia (China and Japan)
- › Growing engineering services revenue for system development
- › Further market potential for connectors and hoses as component sales

5

## Our Proof Points:

- › Volume production in Europe since 2016 with 5 OE brands
- › VW ID.3 sells R744 system as “range extension” (with heat pump)
- › Patented ContiLockR connection
- › Sales projected to grow from 12mn to 120mn by 2029 (+1000% !)

\*Hydrofluorocarbons, related to the potential for global warming (GWP)



# ENSURE SUCCESS

# ContiTech Continuing Value Creation

- Strategic capital allocation toward high-quality industry business
- Stronger industry OE position translates further into profitable replacement business
- Long-term value creation through market and customer focus

**Reliable profitability and upside potential through increased industry share**



# Agenda

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1	Continental Group	3
2	Automotive Group Sector	16
3	Tires Group Sector	52
4	ContiTech Group Sector	67
<b>5</b>	<b>Corporate Governance</b>	<b>89</b>
6	Sustainability	95
7	Financials	106
8	Back-up	119

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# Corporate Governance Corporate Bodies

## Two-tiered Board System

### Shareholders' Meeting

Shareholders' exercise their rights of participation and control

elects  
shareholder  
representatives



discharges



reports



discharges



reports



### Supervisory Board

20 members

10 shareholder representatives  
10 employee representatives

Involvement in decisions of fundamental significance to the company

Chairman's Committee  
Audit Committee  
Nomination Committee  
Mediation Committee  
Committee for Related Party Transactions



appoints,  
monitors  
and advises



reports

### Executive Board

6 members

Responsible for managing the company in accordance with the law, the Articles of Incorporation, and the By-Laws of the Supervisory and Executive Boards, while taking into account the resolutions of the Shareholders' Meeting.

# Corporate Governance Supervisory Board

## Shareholder representatives

### Prof. Dr.-Ing. Wolfgang Reitzle<sup>1</sup>

Chairman of the Supervisory Board

Born 1949, German

First elected 2009



**Dorothea von Boxberg<sup>2</sup>**, born 1974, first elected 2022

**Stefan E. Buchner<sup>2</sup>**, born 1960, first elected 2022

**Dr. Gunter Dunkel<sup>1</sup>**, born 1953, first elected 2009

**Satish Khatu<sup>1</sup>**, born 1952, first elected 2019

**Isabel Corinna Knauf<sup>2</sup>**, born 1972, first elected 2019

**Sabine Neuß<sup>1</sup>**, born 1968, first elected 2014

**Prof. Dr. Rolf Nonnenmacher<sup>2</sup>**, born 1954, first elected 2014

**Klaus Rosenfeld<sup>2</sup>**, born 1966, first elected 2009

**Georg F. W. Schaeffler<sup>1</sup>**, born 1964, first elected 2009

## Employee representatives

### Christiane Benner<sup>3</sup>,

Deputy Chairwoman of the Supervisory Board

Born 1968, German

First elected 2018



**Hasan Allak<sup>3</sup>**, born 1970, first elected 2019

**Francesco Grioli<sup>3</sup>**, born 1972, first elected 2018

**Michael Iglhaut<sup>3</sup>**, born 1964, first elected 2006

**Carmen Löffler<sup>3</sup>**, born 1972, first elected 2021

**Dr. Matthias Ebenau<sup>3</sup>**, born 1984, first elected 2024

**Anne Nothing<sup>3</sup>**, born 1979, first elected 2024

**Jörg Schönfelder<sup>3</sup>**, born 1966, first elected 2004

**Stefan Scholz<sup>3</sup>**, born 1965, first elected 2015

**Matthias Tote<sup>3</sup>**, born 1988, first elected 2024

<sup>1</sup> Elected until 2026. <sup>2</sup> Elected until 2028. <sup>3</sup> Elected until 2029. [Supervisory Board – Overview](#)

# Corporate Governance Supervisory Board

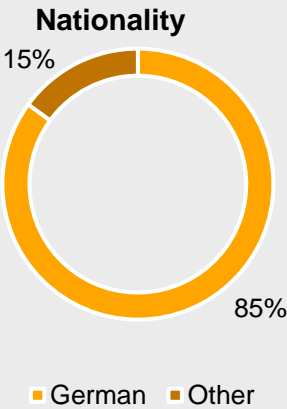
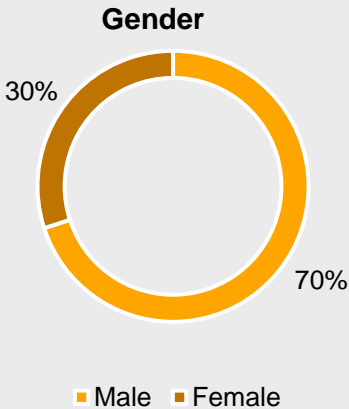
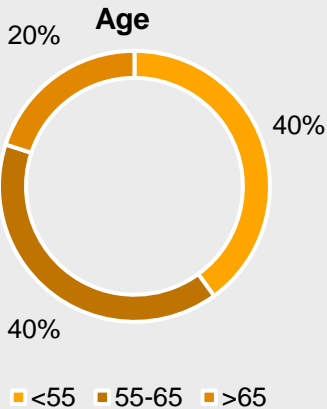
20 board members



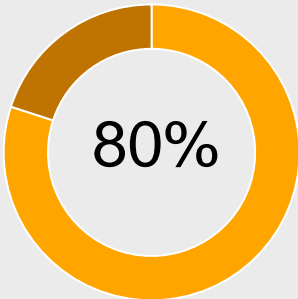
10  
shareholder  
representatives

10  
employee  
representatives

Supervisory board tenure



Independence of shareholder representatives<sup>1</sup>



<sup>1</sup> Independence from controlling shareholder pursuant to German Corporate Governance Code (GCGC). [Corporate Governance - Supervisory Board](#) Updated: Status June 2024.

# Corporate Governance Supervisory Board

	Chairman's Committee	Audit Committee	Nomination Committee	Mediation Committee	Committee for Related Party Transactions
Members	<ul style="list-style-type: none"> <li>▪ Prof. Dr. Wolfgang Reitzle (Chairman)</li> <li>▪ Hasan Allak</li> <li>▪ Christiane Benner</li> <li>▪ Georg F. W. Schaeffler</li> </ul>	<ul style="list-style-type: none"> <li>▪ Prof. Dr. Rolf Nonnenmacher (Chairman)</li> <li>▪ Francesco Grioli</li> <li>▪ Michael Iglhaut</li> <li>▪ Klaus Rosenfeld</li> <li>▪ Georg F. W. Schaeffler</li> <li>▪ Matthias Tote</li> </ul>	<ul style="list-style-type: none"> <li>▪ Prof. Dr. Wolfgang Reitzle (Chairman)</li> <li>▪ Isabel Corinna Knauf</li> <li>▪ Prof. Dr. Rolf Nonnenmacher</li> <li>▪ Georg F. W. Schaeffler</li> </ul>	<ul style="list-style-type: none"> <li>▪ Prof. Dr. Wolfgang Reitzle (Chairman)</li> <li>▪ Hasan Allak</li> <li>▪ Christiane Benner</li> <li>▪ Georg F. W. Schaeffler</li> </ul>	<ul style="list-style-type: none"> <li>▪ Prof. Dr. Wolfgang Reitzle (Chairman)</li> <li>▪ Prof. Dr. Rolf Nonnenmacher</li> <li>▪ Further members to be elected if necessary</li> </ul>
Tasks	<p>Key responsibilities are preparing the appointment of Executive Board members and concluding, terminating and amending their employment contracts and other agreements with them.</p> <p>However, the plenum of the Supervisory Board alone is responsible for establishing the total remuneration of the Executive Board members.</p>	<p>The Audit Committee primarily deals with the audit of the accounts, the monitoring of the accounting process and the effectiveness of the internal control system, the risk management system and the internal audit system, the audit of the financial statements (including sustainability reporting and examination thereof) and compliance.</p>	<p>Responsible for nominating suitable candidates for the Supervisory Board to propose to the Annual Shareholders' Meeting for election.</p> <p>In addition, the committee must propose targets for the Supervisory Board's composition and profile of skills and expertise and review both regularly.</p>	<p>In accordance with Section 31 (3) Sentence 1 MitbestG, the Mediation Committee becomes active only if the first round of voting on a proposal to appoint a member of the Executive Board or to remove a member by consent does not achieve the legally required two-thirds majority.</p>	<p>Deals with transactions between Continental AG and a related person, where these transactions require the prior consent of Continental AG's Supervisory Board in accordance with Sections 111a and 111b AktG. Transactions in this case require the prior consent of the Supervisory Board.</p>



Only decision-making committees are listed in this table. All committees report to the plenary session on a regular basis.

- Shareholder Representative
- Employee Representative

Corporate Governance - Supervisory Board Updated: Status June 2024.

# Corporate Governance Presentation 2024



- › Good, responsible corporate governance geared toward sustainable, long-term value creation is the basis of the company's success in the interest of all its stakeholders.

## Corporate Governance Presentation

# Agenda

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1	Continental Group	3
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<b>6</b>	<b>Sustainability</b>	<b>95</b>
7	Financials	106
8	Back-up	119

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# Our Sustainability Ambition






## Guiding rails in a complex environment

### OUR KEY AMBITIONS

-  **100%** **carbon neutrality**  
along our entire value chain
  -  **100%** **emission-free mobility & industry**  
(no harmful emissions)
  -  **100%** **circular economy**
  -  **100%** **responsible value chain**
-  **by 2050 at the latest**       **and together with our value chain partners**



### + 8 ESSENTIALS

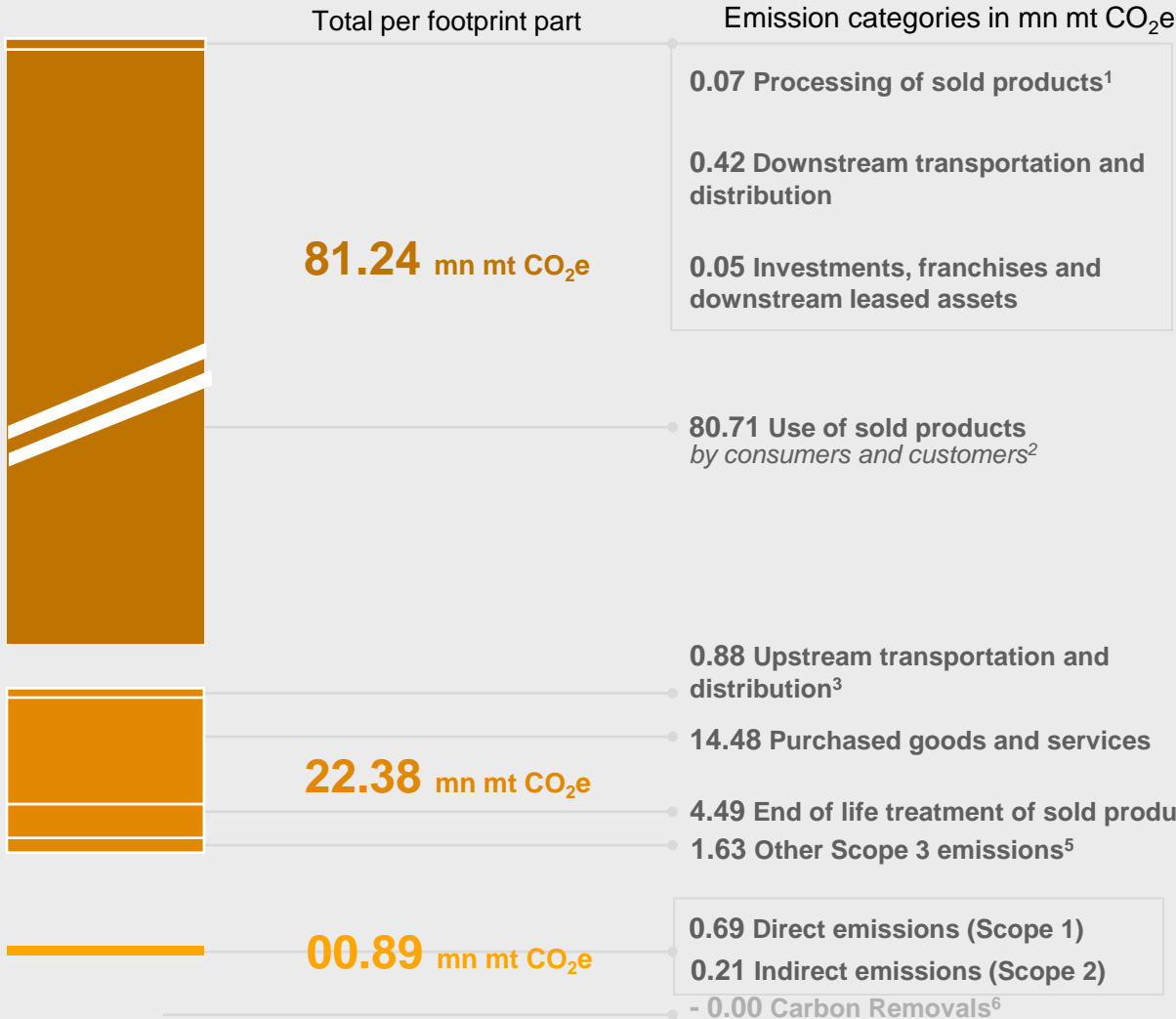
-  **Good working conditions**
-  **Green and safe factories**
-  **Innovations & digitalization**
-  **Benchmark in quality**
-  **Safe mobility**
-  **Long-term value creation**
-  **Sustainable management practices**
-  **Corporate citizenship**

**We will provide solutions matching the speed of our customers, industries and markets.**



# Focus Topic: Carbon Neutrality

Total gross carbon footprint in 2023: ~104 mn CO<sub>2</sub>e




**Customer and product use-related**  
(Scope 3)

**Backpack**  
(Scope 3)

**Own CO<sub>2</sub> emissions**  
(Scope 1+2)

## Carbon Accounting logic:

- Own CO<sub>2</sub> emissions (Scope 1 and 2)
- + ■ Scope 3 backpack
- + ■ Scope 3 customer and product use-related
- = **total gross carbon footprint**
- ■ Scope 3 customer and product use-related
- ■ Carbon removals
- = **total net carbon backpack** 

<sup>1</sup> Excluding the trading goods business within the Automotive group sector, ContiTrade within the Tires group sector and the industrial business within the ContiTech group sector due to an accounting approach that is currently missing. Due to these scope limitations, this category covers 85% of Continental Group sales in 2023. For the Automotive and ContiTech group sectors, emissions do not include the effects of methane (CH<sub>4</sub>)<sup>3</sup> and nitrogen oxide (N<sub>2</sub>O) due to an accounting approach that is currently missing.

<sup>2</sup> Indirect emissions in accordance with the GHG protocol. Some products in the Automotive group sector, especially electronics, consume electricity in their use-phase and may also classify as direct use-phase emissions. They are included, but have not been considered independently in order to avoid doublecounting. In fiscal 2023, the conveyor business – which is part of the industrial business of the ContiTech group sector – is included in the calculations for the first time. The remaining part of the industrial business of the ContiTech group sector is still excluded due to an accounting approach that is currently missing. Individual business operations that are insignificant in terms of CO<sub>2</sub> in the Automotive group sector (trading goods business) and Tires group sector (e.g. parts of the speciality tires business, non-tire products and sold products of ContiTrade) are still excluded. Due to these scope limitations, this category covers 87% of Continental Group sales in 2023. For the Automotive and ContiTech group sectors emissions from passenger vehicles do not include the effects of methane (CH<sub>4</sub>) and nitrogen oxide (N<sub>2</sub>O) due to an accounting approach that is currently missing. Excluding the inbound logistics paid by the suppliers due to an accounting approach that is currently missing.

<sup>3</sup> Excluding the trading goods business within the Automotive group sector. End-of-life treatment for automotive parts is considered for car shredders but not beyond. Further treatments are not transparent. Large amounts of material mass, especially metals, are recycled. Due to these scope limitations, this category covers 98% of Continental Group sales in 2023.

<sup>4</sup> Other emissions include the reporting categories "Business travel," "Fuel- and energy-related activities (not included in Scope 1 or 2)," "Waste generated in operations," "Capital goods," "Employee commuting" and "Upstream leased assets." Details in Sustainability Report.

<sup>5</sup> Only those negative CO<sub>2</sub> emissions due to carbon removal that are purchased and used in the corresponding fiscal year as part of the NetZeroNow global customer program.

<sup>6</sup>

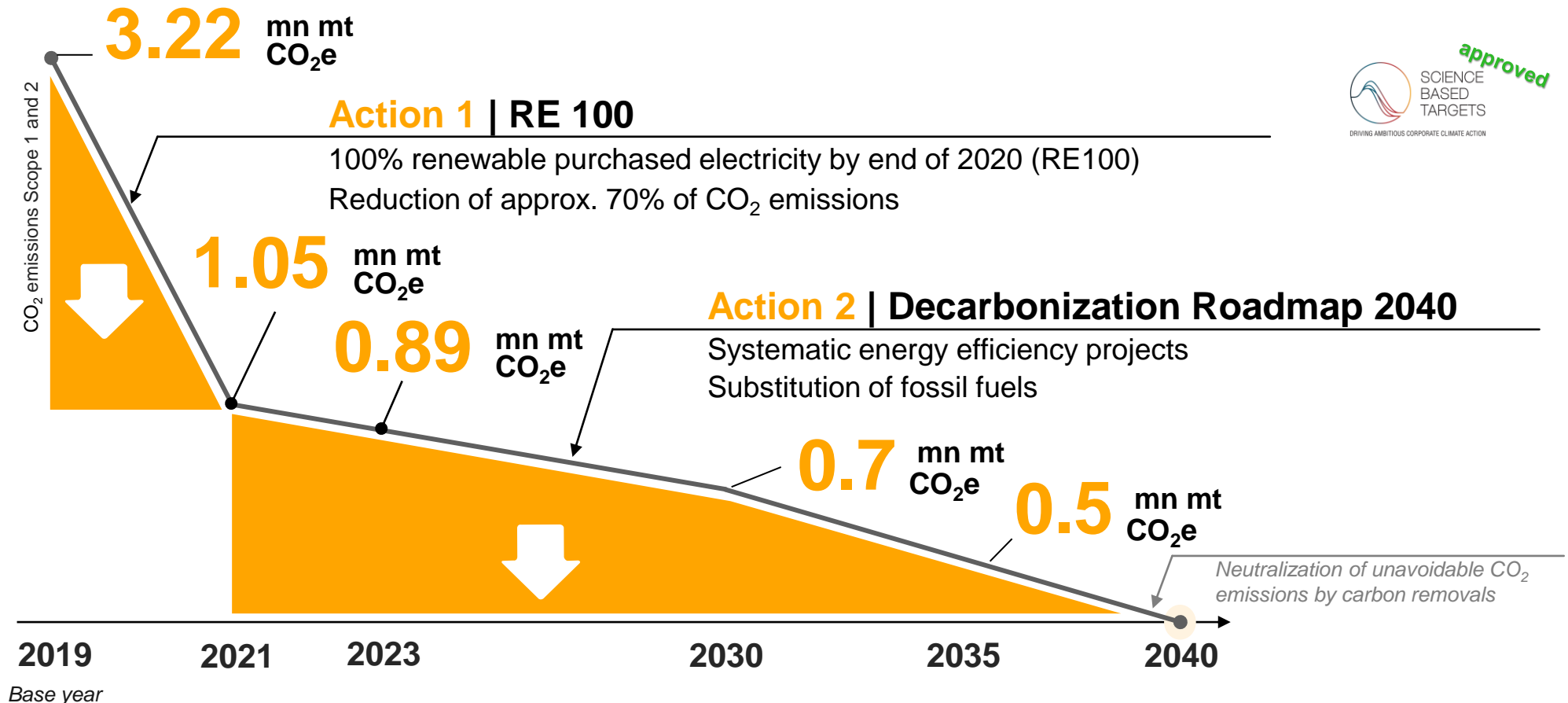
**100% carbon-neutrality along the entire value chain latest by 2050**

# Our Goal: 100% Carbon-neutral Own Operations by 2040

## Reduction path for own CO<sub>2</sub> emissions (Scope 1+2)

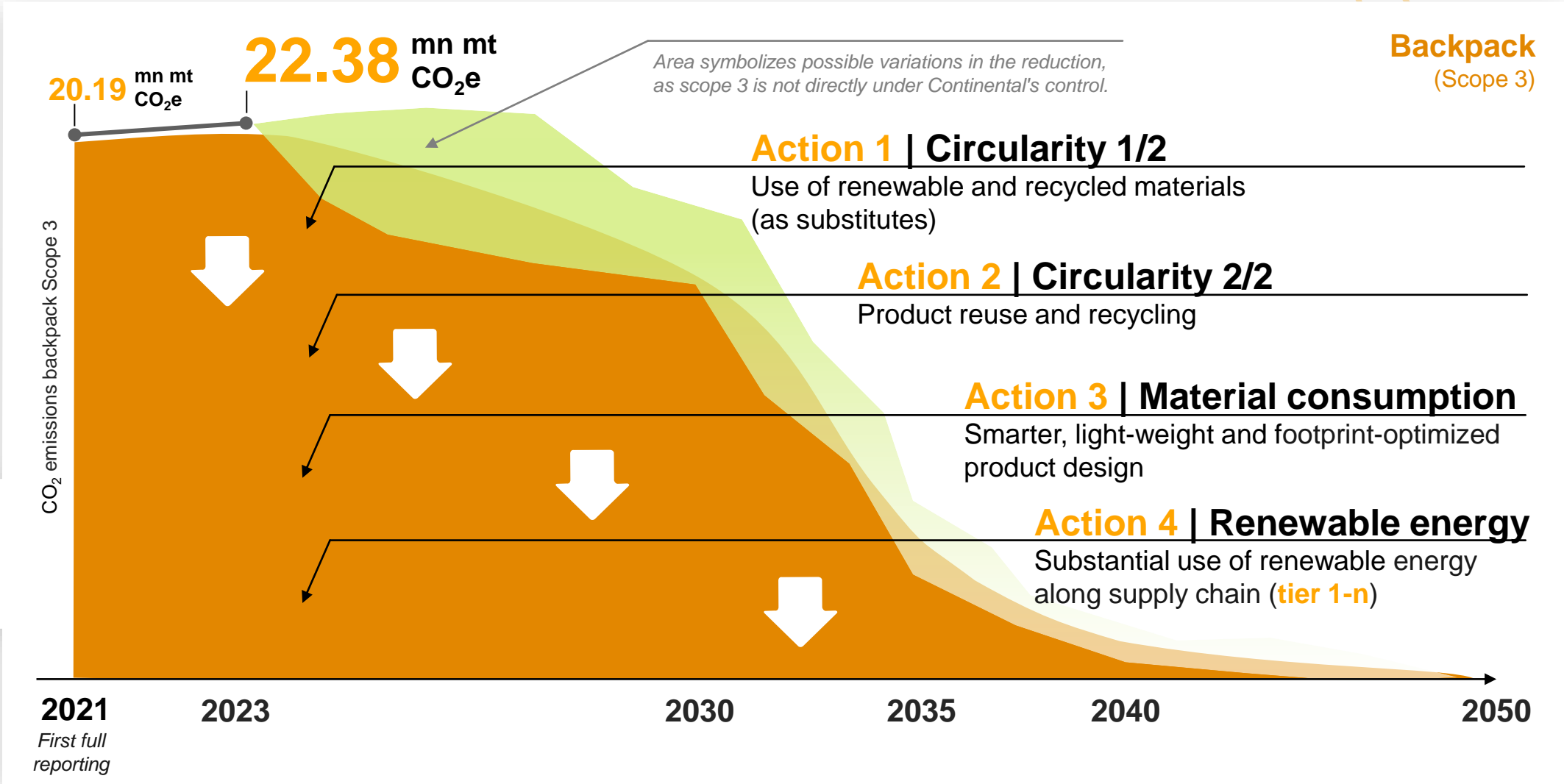


Own CO<sub>2</sub> emissions  
(Scope 1+2)



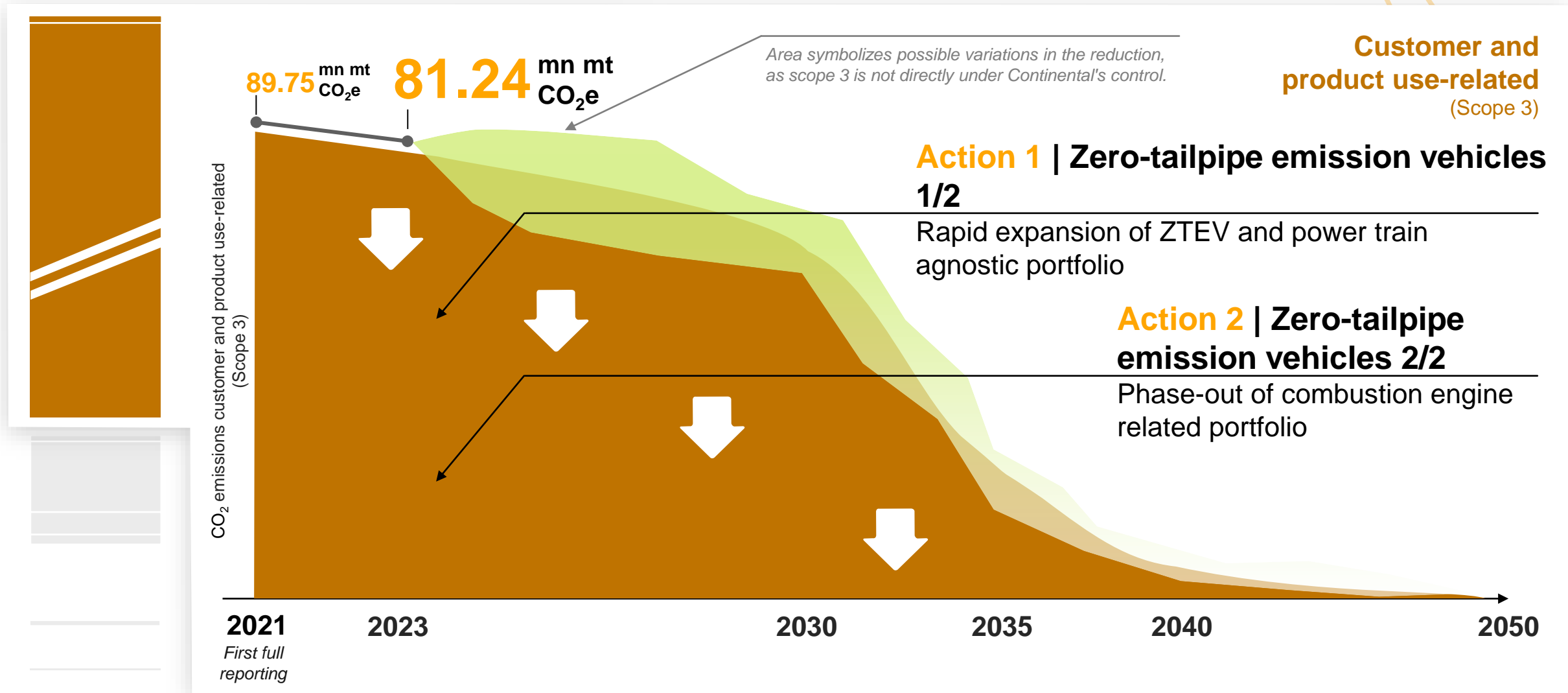
# Our Goal: 100% Along the Entire Value Chain by 2050 at the Latest

## Reduction levers for Continental's gross CO<sub>2</sub> backpack (Scope 3)



# Our Goal: 100% Along the Entire Value Chain by 2050 at the Latest

Reduction levers for customer and product use-related CO<sub>2</sub> emissions (Scope 3)



# Circular Economy in Our Own Operations

## Responsible handling of water and waste



	Challenges	Approach	Objective
<p>Saving Water</p> 	<ul style="list-style-type: none"> <li>Water is an existential and important resource</li> <li>Water scarcity and water scarcity risks in the value chain must be mitigated effectively</li> </ul>	<p>Risk-based targets for water security and a global framework for water programs:</p>  	<p><b>4 %</b> reduction of water withdrawal per year based on sales in water stress high risk areas</p> <p><b>2 %</b> reduction of water withdrawal per year based on sales in water stress medium and low risk areas</p>
<p>Reducing Waste</p> 	<ul style="list-style-type: none"> <li>Globally around 90 billion tons of materials are used each year to fuel our economy</li> <li>Most of the resources follow a linear value chain model.</li> <li>Closed material cycles are necessary to mitigate negative impact on our business.</li> </ul>	<p><b>The waste hierarchy</b></p> 	<p><b>2 %</b> reduction of waste generation per year based on sales</p> <p><b>95 %</b> waste recovery quota by 2030</p>

# Responsible Value Chain Due Diligence System (RVCDDS)



## Areas of RVC Commitments

Our Responsible Value Chain Due Diligence System aims to protect humans & the environment as detailed in our RVC commitments via roles, responsibilities & tasks along 7 core processes:



These rights must be protected in our own operations and supply chain

# Sustainability / Memberships and Initiatives



econsense

Forum Nachhaltige Entwicklung  
der Deutschen Wirtschaft



Diversity Charter

In support of

**WOMEN'S  
EMPOWERMENT  
PRINCIPLES**

Established by UN Women and the  
UN Global Compact Office

Source: [Integrated Sustainability Report 2023, page 132](#)

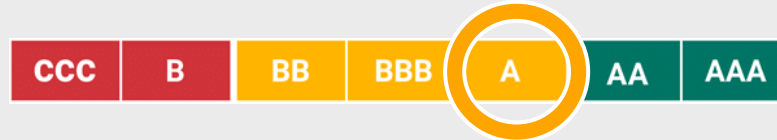
# Sustainability / ESG Ratings

## Scoring Continental

## Classification

**MSCI**  
ESG RATINGS

as of September 2023



AAA = best result  
CCC = worst result



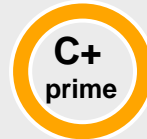
as of June 2023



5 = best practice  
0 = no disclosure

**ISS ESG**

as of May 2024



A+ = best performance  
D- = worst performance

**SUSTAINALYTICS**  
a Morningstar company

as of August 2023



0-10 = neglectable risk  
10-20 = low risk  
20-30 = medium risk  
30-40 = high risk  
40+ = severe risk



as of February 2024



A = Leadership score  
B = Management score  
C = Awareness score  
D = Disclosure score  
F = Failure to disclose

**ecovadis**

as of March 2024



85-100 = Outstanding score  
65-84 = Advanced score  
45-64 = Good score  
25-44 = Partial score  
0-24 = Insufficient score



Continental is listed  
in the following  
indices



FTSE4Good



DAX® 50 ESG



# Integrated Sustainability Report



- › Continental has published a sustainability report every year since 2012 and a combined non-financial statement each year since 2018, with both reports looking at the past fiscal year.
- › The main medium of our sustainability reporting is the integrated sustainability report. This report brings together information, in a modular format, from the company's combined non-financial statement, management report, consolidated financial statements and other sources, as well as additional information.

## Integrated Sustainability Report 2023

# Agenda

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1	Continental Group	3
2	Automotive Group Sector	16
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8	Back-up	119

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# Group at a Glance Outlook 2024



~€41.0 – 44.0

billion in sales



~6.0 – 7.0%

in adj. EBIT<sup>1</sup> margin



~€0.7 – 1.1

billion in adj. free cash flow<sup>2</sup>

Automotive ~€20.0 – 22.0 bn

~3.0 – 4.0%

Tires ~€14.0 – 15.0 bn

~13.0 – 14.0%

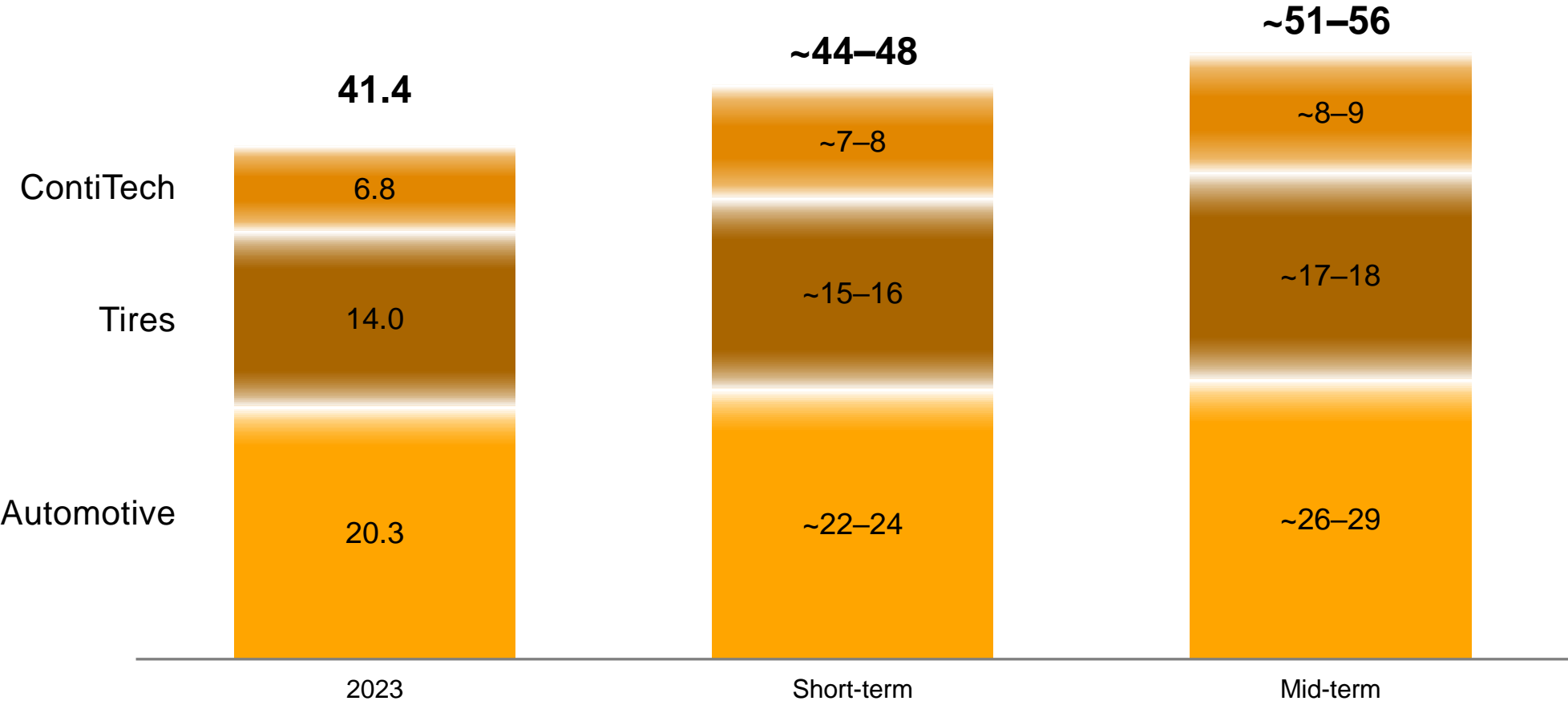
ContiTech ~€6.6 – 7.0 bn

~6.5 – 7.5%

<sup>1</sup> Before amortization of intangibles from PPA, changes in the scope of consolidation, and special effects. <sup>2</sup> Free cash flow adjusted for acquisitions and divestments of companies and business operations.

# Era of Execution Topline Development

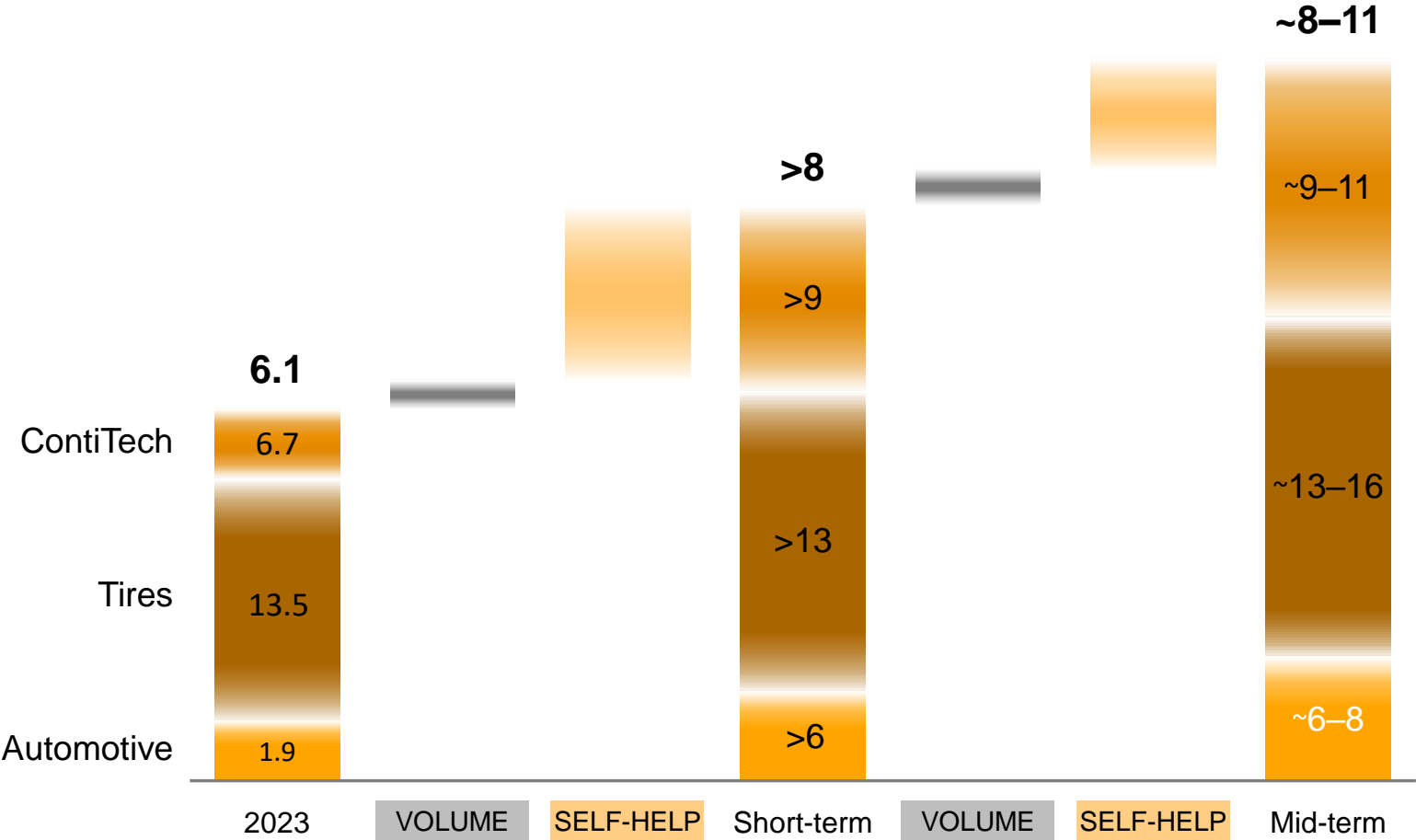
Sales (€ bn)



Considering current portfolio.

# Era of Execution Path of Profitability

Adjusted EBIT<sup>1</sup> margin (%)

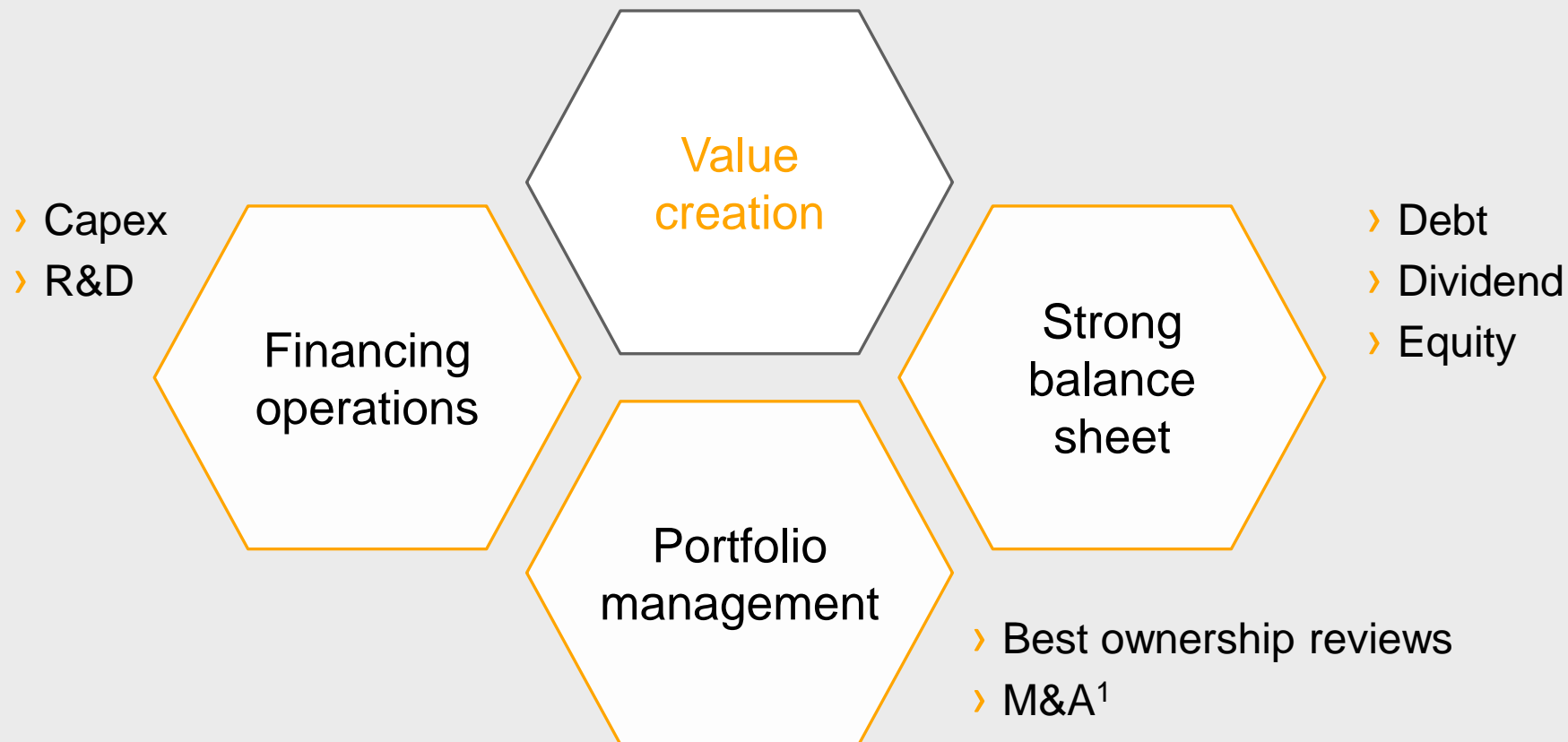


Main drivers:

- Volume
- Self-help
  - > Commercial excellence
  - > Outperformance in targeted profit pools
  - > Operational excellence
  - > Footprint rightsizing

<sup>1</sup> Before amortization of intangibles from PPA, changes in the scope of consolidation (only 2023), and special effects. Considering current portfolio.

# Era of Execution Effective Capital Allocation

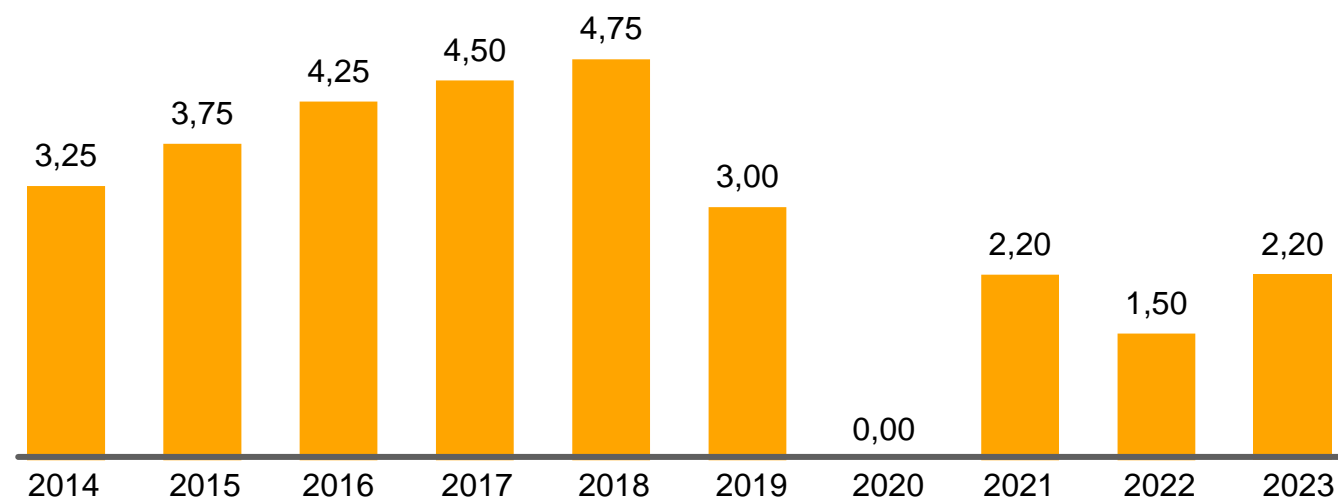


**Strategic capital allocation to strengthen total shareholder return**

<sup>1</sup> Mergers and Acquisitions

# Era of Execution Updated Dividend Policy

## Dividend per share<sup>1</sup> (€)



## Payout ratio<sup>2</sup>

27%	28%	30%	30%	33%	n.a.	n.a.	31%	not applied	38%
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2023 onwards payout ratio<sup>2</sup>

**~20% to ~40%**

(Previously ~15% to ~30%)

<sup>1</sup> Dividend paid for the respective fiscal year, payout in the subsequent year. <sup>2</sup> The ratio between the dividend for the fiscal year and the earnings per share.

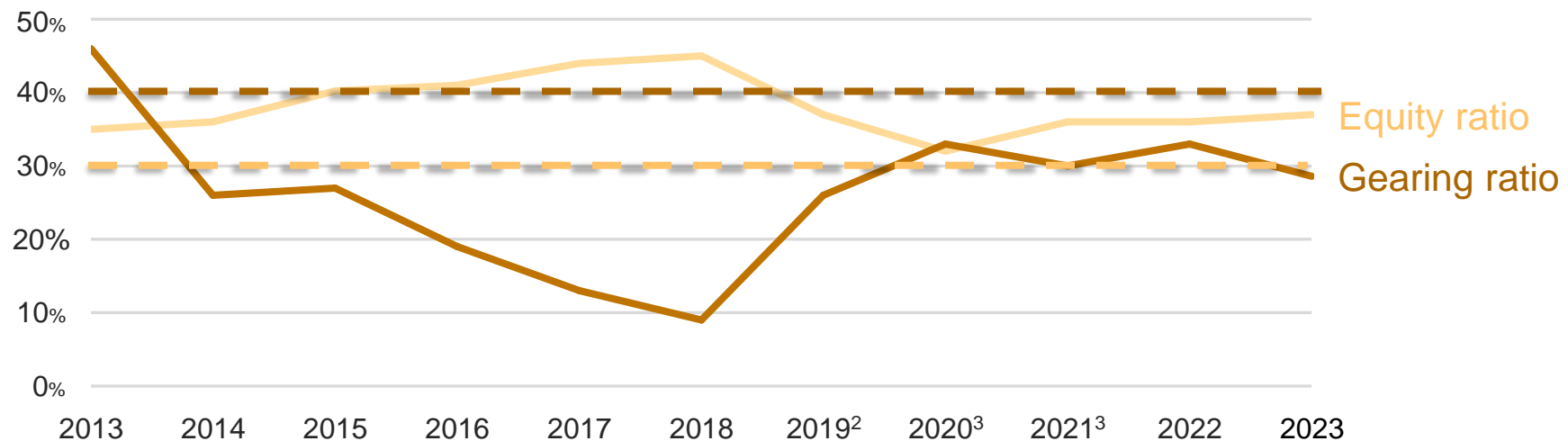
# Era of Execution Committed to Investment Grade

## Current credit rating

Moody's (since August 23, 2022)	Baa2 Stable outlook
Standard & Poor's (since March 22, 2023)	BBB Stable outlook
Fitch (since December 12, 2023)	BBB Stable outlook

## Mid-term targets | Group

Rating	BBB/BBB+
Gearing ratio <sup>1</sup>	<40%
Equity ratio	>30%



<sup>1</sup> Net indebtedness divided by equity. <sup>2</sup> IFRS 16, Leases, has been applied since 2019. <sup>3</sup> The spin-off of Vitesco Technologies on September 15, 2021, resulted in the application of IFRS 5, Non-current Held for Sale and Discontinued Operations.



# Era of Execution Expectations on Cash Flow

All figures mid-term

## Capital expenditure | Group Sectors

Automotive ~6–7%

Tires ~7–8%

ContiTech ~4–5%

## Cash generation<sup>1</sup> | Group Sectors

Automotive >45%

Tires >60%

ContiTech >65%

## Capital expenditure | Group

**~6–7%**

## Cash conversion<sup>2</sup> | Group

**>70%**

<sup>1</sup> Cash Generation: (EBITDA – CAPEX) / EBITDA, potentially excluding major one-time items. <sup>2</sup> Ratio of free cash flow adjusted for acquisitions and divestments of companies and business operations to net income attributable to the shareholders of the parent.  
Considering current portfolio.

# Era of Execution Our Commitment

	Automotive		Tires		ContiTech	
	Short-term	Mid-term	Short-term	Mid-term	Short-term	Mid-term
Sales	~€22–24 bn	~€26–29 bn	~€15–16 bn	~€17–18 bn	~€7–8 bn	~€8–9 bn
Adjusted EBIT <sup>1</sup> margin	>6%	~6–8%	>13%	~13–16%	>9%	~9–11%
Return on capital employed <sup>2</sup>	>15%	>20%	>20%	>23%	>20%	>22%
Cash generation <sup>3</sup>		>45%		>60%		>65%
Outperformance <sup>4</sup>	~3–5%	~3–5%				
R&D to sales ratio <sup>5</sup>	~11%	High-single digits				

<sup>1</sup> Before amortization of intangibles from PPA, and special effects. <sup>2</sup> ROCE – Ratio of EBIT to average operating assets for a fiscal year. <sup>3</sup> Cash generation: (EBITDA – CAPEX) / EBITDA, potentially excluding major one-time items. <sup>4</sup> Outperformance: sales growth compared to PC&LT production. <sup>5</sup> Research and development expenses (net) in % of sales. Considering current portfolio.

# Era of Execution Our Commitment

	Group	
	Short-term	Mid-term
Sales	~€44–48 bn	~€51–56 bn
Adjusted EBIT <sup>1</sup> margin	>8%	~8–11%
Return on capital employed <sup>2</sup>	>15%	>20%
Cash conversion <sup>3</sup>	>70%	>70%

<sup>1</sup> Before amortization of intangibles from PPA, and special effects. <sup>2</sup> ROCE – Ratio of EBIT to average operating assets for a fiscal year. <sup>3</sup> Ratio of free cash flow adjusted for acquisitions and divestments of companies and business operations to net income attributable to the shareholders of the parent, assuming a tax rate of ~27%. Considering current portfolio.

# Group Clear Path to Value Creation

- Foundations laid for sustainable profitable growth
- Sharpened capital allocation in place
- Committed financially driven organization

**Welcome to our era of execution**

# Disclaimer

- › This presentation has been prepared by Continental Aktiengesellschaft based on the Capital Market Day in December 2023, the full year results published in the 2023 annual report, as well as the 2023 sustainability report. It has not been independently verified. It does not constitute an offer, invitation or recommendation to purchase or subscribe for any shares or other securities issued by Continental AG or any subsidiary (jointly “Continental Group”) and neither shall any part of it form the basis of, or be relied upon in connection with, any contract or commitment concerning the purchase or sale of such shares or other securities whatsoever.
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- › This presentation includes assumptions, estimates, forecasts and other forward-looking statements, including statements about our beliefs and expectations regarding future developments as well as their effect on the results of the Continental Group. These statements are based on plans, estimates and projections as they are currently available to the management of the Continental Group. Therefore, these statements speak only as of the date they are made, and we undertake no obligation to update publicly any of them in light of new information or future events. Furthermore, although the management is of the opinion that these statements, and their underlying beliefs and expectations, are realistic as of the date they are made, no guarantee is or can be given that the expected developments and effects will actually occur. Many factors may cause the actual development to be materially different from the expectations expressed herein. Such factors include, for example and without limitation, changes in general economic and business conditions, fluctuations in currency exchange rates or interest rates, the introduction of competing products, the lack of acceptance for new products or services and changes in business strategy.
- › All statements with regard to markets or market position(s) of the Continental Group or any of its competitors are estimates of the Continental Group based on data available to the Continental Group. Such data are neither comprehensive nor independently verified. Consequently, the data used are not adequate for and the statements based on such data are not meant to be an accurate or proper definition of regional and/or product markets or market shares of the Continental Group and any of the participants in any market.
- › The tables on the key figures for the group sectors show only the figures for continuing operations in the reporting and comparative periods for all group sectors. As part of the new Automotive organizational structure (in place since January 1<sup>st</sup> 2024) the dissolved Smart Mobility business area is integrated into the respective business areas of Autonomous Mobility, Architecture and Networking and Software and Central Technologies. All key figures for the group sector Automotive reflect this over the entire reporting period and are adjusted accordingly pro forma for the comparative period.
- › Unless otherwise stated, all amounts are shown in millions of euro. Please note that differences may arise as a result of the use of rounded amounts and percentages.

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# References

## Useful Links to Continental Websites

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Investor Relations

[Investor Relations](#)

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Capital Market Day

[Capital Market Day 2023](#)

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Latest Presentations

[Presentations](#)

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Events

[Events](#)

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Finance Calendar

[Finance Calendar](#)

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Sustainability

[Sustainability](#)

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Integrated Sustainability Report

[Integrated Sustainability Report 2023](#)

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Corporate Governance Principles

[Corporate Governance Principles](#)

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Corporate Governance Presentation

[Corporate Governance Presentation 2024](#)

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Annual Report

[Annual Report 2023](#)

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Shares

[Shares](#)

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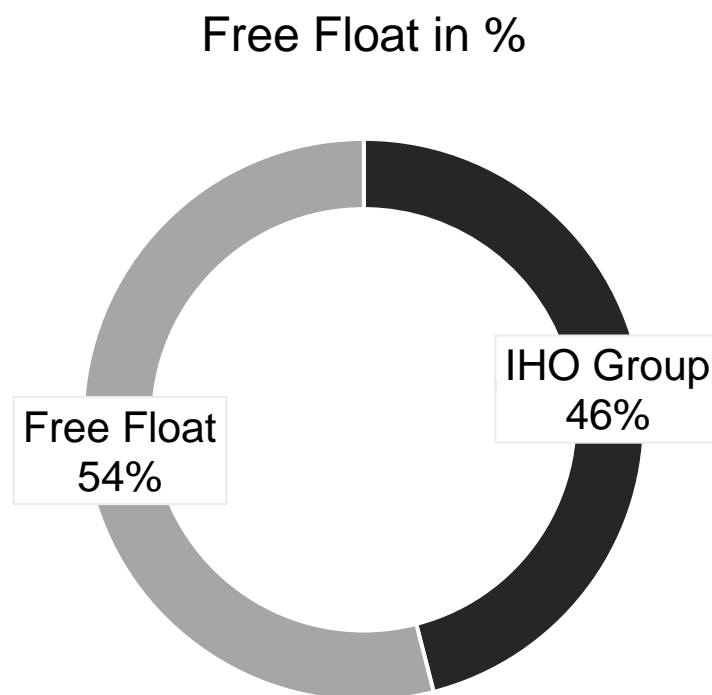
Debt and Rating

[Debt and Rating](#)

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# Continental Shareholder Structure



- › **Total number of shares issued: 200,005,983**
- › As in the previous year, free float as defined by Deutsche Börse AG amounted to 54.0% as at the end of 2023. The most recent change took place on September 17, 2013, when our major shareholder, the IHO Group, Herzogenaurach, Germany, announced the sale of 7.8 million Continental shares, reducing its shareholding in Continental AG from 49.9% to 46.0%.

## Continental Shareholder Structure

# Continental Supervisory Board

## Members

### Prof. Dr.-Ing. Wolfgang Reitzle

- › [Curriculum Vitae - Prof. Dr.-Ing. Wolfgang Reitzle](#)
- › First elected: 2009

### Dr. Gunter Dunkel

- › [Curriculum Vitae - Dr. Gunter Dunkel](#)
- › First elected: 2009

### Isabel Corinna Knauf

- › [Curriculum Vitae - Isabel C. Knauf](#)
- › First elected: 2019

### Klaus Rosenfeld

- › [Curriculum Vitae - Klaus Rosenfeld](#)
- › First elected: 2009

### Hasan Allak\*

- › [Curriculum Vitae - Hasan Allak](#)
- › First elected: 2019

### Dr. Matthias Ebenau\*

- › [Curriculum Vitae - Dr. Matthias Ebenau](#)
- › First elected: 2024

### Carmen Löffler

- › [Curriculum Vitae - Carmen Löffler](#)
- › First elected: 2021

### Georg F. W. Schaeffler

- › [Curriculum Vitae - Georg F.W. Schaeffler](#)
- › First elected: 2009

### Christiane Benner\*

- › [Curriculum Vitae - Christiane Benner](#)
- › First elected: 2018

### Francesco Grioli\*

- › [Curriculum Vitae - Francesco Grioli](#)
- › First elected: 2018

### Sabine Neuß

- › [Curriculum Vitae - Sabine Neuß](#)
- › First elected: 2014

### Jörg Schönfelder\*

- › [Curriculum Vitae - Jörg Schönfelder](#)
- › First elected: 2004

### Dorothea von Boxberg

- › [Curriculum Vitae - Dorothea von Boxberg](#)
- › First elected: 2022

### Michael Iglhaut\*

- › [Curriculum Vitae - Michael Iglhaut](#)
- › First elected: 2006

### Prof. Dr. Rolf Nonnenmacher

- › [Curriculum Vitae - Prof. Dr. Rolf Nonnenmacher](#)
- › First elected: 2014

### Stefan Scholz\*

- › [Curriculum Vitae - Stefan Scholz](#)
- › First elected: 2015

### Stefan E. Buchner

- › [Curriculum Vitae - Stefan E. Buchner](#)
- › First elected: 2022

### Satish Khatu

- › [Curriculum Vitae - Satish Khatu](#)
- › First elected: 2019

### Anne Nothing\*

- › [Curriculum Vitae - Anne Nothing](#)
- › First elected: 2024

### Matthias Tote\*

- › [Curriculum Vitae - Matthias Tote](#)
- › First elected: 2024

\*The members are elected by the employees of Continental AG and its German subsidiaries.  
[Supervisory Board - Overview](#)

# Continental Executive Board

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## Members of Executive Board

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Nicolai Setzer

[Curriculum Vitae - Nikolai Setzer](#)

Olaf Schick

[Curriculum Vitae - Olaf Schick](#)

Dr. Ariane Reinhart

[Curriculum Vitae - Dr. Ariane Reinhart](#)

Christian Kötz

[Curriculum Vitae - Christian Kötz](#)

Philip Nelles

[Curriculum Vitae - Philip Nelles](#)

Philipp von Hirschheydt

[Curriculum Vitae - Philipp von Hirschheydt](#)

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**Continental** 

The Future in Motion